



# Horizon Europe Programme

## Guide for Applicants

### Marie Skłodowska-Curie Actions – Staff Exchanges (SE)

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#### **Disclaimer**

*This guide aims to support potential applicants to the MSCA-SE 2021 call. It is provided for information purposes only and is not intended to replace consultation of any applicable legal sources. Neither the European Commission, nor the European Research Executive Agency (or any person acting on their behalf) can be held responsible for the use made of this guidance document. The guidance provided in the Annotated Model Grant Agreement shall prevail in case of discrepancies.*



## History of changes

<b>Version</b>	<b>Date</b>	<b>Change</b>	<b>Page</b>
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## Table of Contents

1. Staff Exchanges – A few definitions and concepts.....	4
2. Staff Exchanges in a nutshell .....	5
3. Eligibility Conditions .....	6
3.1 Minimal conditions for a consortium.....	6
3.2 Staff member eligibility .....	7
4. Secondments .....	7
4.1 Secondment duration and split-stays .....	7
4.2 Sending and hosting organisations .....	8
4.3 Distribution of secondments .....	8
4.4 Same-sector secondments .....	9
4.5 Unit cost contributions .....	9
5. Instructions for completing Part A and Part B of the proposal .....	9

# 1. Staff Exchanges – A few definitions and concepts

All main definitions (not included in this guide) are available in the [MSCA part of the Horizon Europe Work Programme](#). Links to other official documents (e.g. [Horizon Europe General Annexes](#) of the Work Programme, [Horizon Europe Unit Model Grant Agreement](#), [Horizon Europe Programme Guide](#)) are provided in the [call page on the Funding & Tenders Portal](#).

**The objective of Staff Exchanges** is to provide support for joint research and innovation (R&I) projects through the exchange of staff within partnerships of universities, research infrastructures, businesses, and other socio-economic actors in Europe and beyond, thus strengthening inter-sectoral and international collaboration.

**A Staff Exchanges project** is a high quality and credible R&I project with an original idea demonstrating a clear added-value to the *state-of-the-art* in its scientific field. The project should be realised through well-planned and targeted knowledge sharing activities and proposed interactions between the participating organisations. Projects can be implemented together with other related R&I activities funded by another EU grant (e.g. Horizon Europe grants other than the MSCA, Erasmus+, Structural Funds etc.) as long as this does not entail double funding<sup>1</sup>.

**⚠️IMPORTANT:** It is not possible to have the same staff funded at the same time under two or more MSCA grants.

**The implementation of the project** is performed via the secondment of staff to other beneficiaries and associated partners from the academic and/or non-academic sectors. Additional activities, such as joint workshops and conferences, also contribute to the successful implementation of the project.

**The staff members** can be researchers at any career stage (from doctoral candidates to postdoctoral researchers), as well as administrative, managerial or technical staff supporting the R&I activities under the project. They must have been actively engaged or linked to R&I activities for at least one month (full-time equivalent) at the sending institution, before the first period of secondment.

**The coordinator** is one of the beneficiaries and the central contact point for the European Research Executive Agency (REA). The coordinator represents the consortium towards REA. The coordinator's responsibilities are elaborated in the [Horizon Europe Unit Model Grant Agreement](#) (Article 7).

**Interdisciplinary:** Secondments are considered as *interdisciplinary* if the activities performed during the secondment integrate aspects (information, data, techniques, tools, perspectives, concepts or theories) from two or more different scientific disciplines. In assessing the interdisciplinary dimension of proposals, expert evaluators will consider the keywords available in part A of the proposal form making reference, in principle, to the [first level of MSCA keywords](#). This could for example be C1-Inorganic Chemistry and C2-Organic, Polymer and Molecular Chemistry, or C1-Inorganic Chemistry and E1-Economics.

**National Contact Points (NCPs)** have been set up by national governments across Europe and beyond to provide information and personalised support to Horizon Europe applicants in their native language. The mission of NCPs is to raise awareness, inform and advise on Horizon Europe funding opportunities as well as to support potential applicants in the preparation, submission and follow-up of their grant applications. For details on the NCP in your country, please consult the NCP [page](#).

<sup>1</sup> See note on synergies between the MSCA and Erasmus+ available on <https://op.europa.eu/en/publication-detail/-/publication/f4d7d733-19ba-11ec-b4fe-01aa75ed71a1/language-en/format-PDF/source-230944692>

## 2. Staff Exchanges in a nutshell

Overview	
Minimum number of participating organisations	3 <sup>2</sup>
Minimum number of beneficiaries from EU Member States or Horizon Europe Associated Countries <sup>3</sup>	2
Academic sector <sup>4</sup>	No restrictions <sup>5</sup>
Non-academic sector <sup>6</sup>	No restrictions <sup>5</sup>
Max number of person months	360
Interdisciplinary secondments <sup>7</sup>	≤ 1/3
Secondment duration <sup>8</sup>	1 – 12 months
Associated partners	No minimum Mandatory Letter of Commitment
Ranking lists <sup>9</sup>	8 (scientific) panels <sup>10</sup>
Budget 2021	72.5 Mio €

Summary of tasks				
Status	Sign Grant Agreement	Secondment of staff	Training and/or hosting of seconded staff	Directly claim costs
<b>Beneficiary</b>	✓	✓	✓	✓
<b>Associated partner*</b>	x	✓	✓	x

\* Only secondments from associated partners located in low to middle-income third countries included in the list of countries in the [Horizon Europe Programme Guide](#) are eligible for funding. See section 4.2 below.

<sup>2</sup> Minimum three independent legal entities in three different countries, two of which established in a different EU Member State or Horizon Europe Associated Country.

<sup>3</sup> Association to Horizon Europe is governed by the Horizon Europe Regulation (EU) 2021/695 of the European Parliament and of the Council of 28 April 2021 establishing Horizon Europe – the Framework Programme for Research and Innovation, laying down its rules for participation and dissemination, and repealing Regulations (EU) No 1290/2013 and (EU) No 1291/2013 (OJ 12.5.2021 L 170/1).

<sup>4</sup> For the definition of 'academic sector', please refer to the [MSCA Work Programme](#).

<sup>5</sup> If all participating organisations are from the same sector (i.e. either academic or non-academic), there must be at least one organisation from a non-associated third country.

<sup>6</sup> For the definition of 'non-academic sector', please refer to the [MSCA Work Programme](#).

<sup>7</sup> Same-sector secondments (that meet the interdisciplinary conditions of section 4.4) between institutions in EU Member States / Horizon Europe Associated Countries are eligible for funding for up to 1/3 of the project's total eligible person-months funded by the EU.

<sup>8</sup> The minimum secondment duration of each eligible staff member is 1 month. The maximum duration is 12 months. The secondment of a staff member may be split into several stays with one or several beneficiaries or associated partners.

<sup>9</sup> All eligible proposals will be evaluated under one of the eight major areas of research (known as scientific panels). Each panel will establish a ranked list of proposals for funding.

<sup>10</sup> Chemistry (CHE); Social Sciences and Humanities (SOC); Economic Sciences (ECO); Information Science and Engineering (ENG); Environment and Geo-Sciences (ENV); Life Sciences (LIF); Mathematics (MAT), and Physics (PHY).

## 3. Eligibility Conditions

### 3.1 Minimal conditions for a consortium

The minimal conditions when forming an MSCA Staff Exchanges consortium consist of three elements:

- **Organisations:** Composed of at least three legal entities independent of each other.
- **Countries<sup>11</sup>:** Organisations established in three different countries, of which at least two must be in different EU Member States and/or Horizon Europe Associated Countries;
- **Sectors:** For consortia composed of organisations established in Member States/Associated Countries only, at least one organisation should belong to a different sector (academic or non-academic). If all participating organisations are from the same sector, there must be at least one organisation from a non-associated third country.

Above these minimum requirements, additional organisations established in Member States/Associated Countries and/or in non-associated third countries can participate under the conditions provided by the [Horizon Europe rules for participation and dissemination](#).

There is no pre-defined size for Staff Exchanges projects. However, it is recommended to keep the size of the consortium between 6 to 10 organisations. As for the number of associated partners, it should remain reasonable and commensurate with the size of the network.

#### **⚠️ IMPORTANT:**

1. The type of organisation (academic vs. non-academic) is ultimately determined by the validation of the legal entity through registration in the Funding & Tender Portal. The data provided for the registration/validation of the legal entity will automatically classify the organisation in one of the two sectors and will help ensure that eligibility conditions are met;
2. Only low to middle-income third countries listed in the [Horizon Europe Programme Guide](#) are eligible to receive funding for sending a staff member to an EU Member State and Horizon Europe Associated Country;
3. For secondments from associated partners linked to a beneficiary, only the sector (academic or non-academic) of the beneficiary counts; the linked associated partners will be considered to belong to the same sector as their beneficiary. The involvement of associated partners linked to a beneficiary must NOT be used to circumvent the eligibility conditions stated in the [MSCA part of the Work Programme](#);
4. Secondments must always take place between different countries and between legal entities independent from each other. Secondments from/to branches/departments of beneficiaries/associated partners, which are not separate legal entities, are NOT eligible, even if they are located in countries other

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<sup>11</sup> International organisations with headquarters in an EU Member State or Horizon Europe Associated Country are deemed to be established in this Member State or Associated Country. The Joint Research Centre, international European research organisations and legal entities created under EU law are deemed to be established in a Member State other than those in which the other legal entities participating in the action are established. International European research organisations, the majority of whose members are Member States or Associated Countries and whose principal objective is to promote scientific and technological cooperation in Europe, are eligible to receive funding (see [MSCA Work Programme](#)).

than the country of their beneficiary/associated partners; secondments between associated partners linked to a beneficiary and their linked beneficiary are not possible;

5. Each associated partner must include in the proposal an up-to-date **Letter of Commitment**, signed by its legal representative, to demonstrate its real commitment and active participation in the proposed consortium. This letter must be included in Part B of the proposal, which does not count in the page limit.

### 3.2 Staff member eligibility

Staff seconded under MSCA Staff Exchanges must comply with the specific eligibility conditions summarised in Table 1 below.

**Table 1:** List of conditions for staff eligibility

Condition	Explanation
1. Be considered staff of the sending organisation	<ul style="list-style-type: none"> <li>☑ Type of relationship (employment contract, fellowship or other) between the staff member and the sending organisation must comply with the applicable national law and internal practices (e.g. PhD candidate is sufficient to be considered staff member at the organisation where they are registered).</li> <li>☑ The staff member must be under the direction and instructions of the sending organisation for the duration of the secondment.</li> <li>⚠ <b>IMPORTANT:</b> In case a person is a member of staff of two or more independent organisations, which are participating in an MSCA Staff Exchanges project, this person can only be seconded from one of these organisations. Moreover, the staff member can only be seconded to organisations with which he/she is not affiliated.</li> </ul>
2. Be actively engaged in or linked to R&I activities at the sending institution	<ul style="list-style-type: none"> <li>☑ For at least <b>one month</b> (full-time equivalent), immediately prior to the first period of secondment. In the case of former part-time work, the duration must be calculated on a pro-rata basis (e.g. if working on a 50% schedule, the staff member must have worked for at least two months before the secondment). <b>Note that all secondments must be performed on a full-time basis only.</b></li> </ul>
3. Have the appropriate R&I experience	<ul style="list-style-type: none"> <li>☑ Staff members shall have <b>appropriate competence</b> to implement the project and R&amp;I work packages and deliverables. Moreover, those with a purely administrative role (e.g. accountants) are not considered to be actively involved in the R&amp;I activities of the organisation. Therefore, they are not eligible for secondments.</li> </ul>
4. Return to the sending institution	<ul style="list-style-type: none"> <li>☑ After the period of secondment, seconded staff should <b>return to their sending institution</b>, thus maximising the impact of the action for knowledge sharing and long-term collaboration.</li> </ul>

## 4. Secondments

### 4.1 Secondment duration and split-stays

MSCA Staff Exchanges "secondments" are the core of the R&I project. The secondments for each staff must be a minimum of 1 month and a maximum of 12 months (independently of the number of organisations the staff is seconded to). A secondment may be split into several stays (called a "split stay") with one or several beneficiaries or associated partners, as long as it respects the above-mentioned maximum and minimum duration (see table 2). The duration of the secondment is counted from the day of departure to the day of return.

## 4.2 Sending and hosting organisations

Secondments from beneficiaries and from associated partners located in low and middle-income third countries listed in the [Horizon Europe Programme Guide](#) on the Funding & Tenders Portal are eligible for funding.

Eligible secondments from associated partners located in low and middle-income third countries are to be claimed by the beneficiaries with whom they exchange staff. This should be regulated in the partnership agreement<sup>12</sup>. Each beneficiary (as grant recipient) is responsible for the technical and financial implementation of the project.

Secondments from other associated partners are not automatically eligible for funding and therefore by default have to participate at their own cost. They may however receive funding exceptionally, if the granting authority considers that their participation is essential for implementing the project.

The eligibility rules for EU funding for organisations from the above countries are summarised in Table 2 below. It is important to highlight that same-sector secondments (e.g. from university to university) between EU Member States /Horizon Europe Associated Countries are allowed for up to one third of the total person-months implemented under the project, as long as they meet the interdisciplinary criteria (see section 1 for definition).

**Table 2:** Eligibility for EU funding of secondments between organisations

		"HOSTING" (receiving seconded staff members)		
		Academic organisation in MS/AC (1)	Non-academic organisation in MS/AC (2)	Organisation in TC*
"SENDING" (seconding staff members from organisation)	Academic organisation in MS/AC (1)	1/3	✓	✓
	Non-academic organisation in MS/AC (2)	✓	1/3	✓
	Organisation in TC*	✓	✓	✗

**1/3** This symbol refers to same sector secondments up to 1/3 of the total implemented secondments funded by the EU as long as they are demonstrated to be interdisciplinary.

\* denotes TC partners that are eligible for automatic funding

## 4.3 Distribution of secondments

There are no conditions regarding the distribution of secondments between participating organisations. Rather, all secondments should be relevant for the implementation of the R&I action and reflect the involvement and tasks of all participating organisations during the project. The planning should be realistic, time

<sup>12</sup> It is strongly encouraged to conclude a Partnership Agreement with the third countries associated partner to establish clear and transparent rules governing the internal relations between MS/AC beneficiaries and third countries partner organisations. The Partnership Agreement can take various forms depending on the real needs of the project. For example, it can be fully incorporated in the Consortium Agreement (as a separate chapter) or be a standing alone document or be subdivided in several bilateral agreements.



bound and should ensure adequate measures to cope with unforeseen/unexpected delays.

#### **4.4 Same-sector secondments**

In MSCA Staff Exchanges, secondments should be mainly *international* (i.e. between EU Member States/Associated Countries and non-associated third countries) and/or *intersectoral* (i.e. secondments between different Member States/Associated Countries and between different sectors). Moreover, up to 1/3 of the total secondments funded by the EU can be secondments between Member States/Associated Countries within the same sector (academic or non-academic) if those secondments are *interdisciplinary*.<sup>13</sup>

**⚠️IMPORTANT:** For the secondments to be considered *interdisciplinary*, all the necessary information should be provided in the proposal. If the secondments between participants in the same sector in different EU Member States/Associated Countries are not considered as *interdisciplinary* by the evaluators, those secondments will not be eligible for funding, should the proposal be funded. You may refer to a few examples in our [FAQ](#).

#### **4.5 Unit cost contributions**

The financial contribution to an MSCA Staff Exchanges project is calculated on the basis of **unit costs**, as specified in the specific conditions of the [MSCA part of the Horizon Europe Work Programme](#). The budget will be calculated based on the person-months provided in the indicative budget table in Part A of the proposal.

**⚠️IMPORTANT:** the salary of the seconded staff member or any other type of remuneration is not covered by the EU contribution. Therefore, the beneficiaries and associated partners are expected to continue paying the staff member's salary (or any other type of remuneration) during their stay abroad.

**⚠️IMPORTANT:** any secondments planned to do purely management activities (e.g. project coordination meetings, report drafting, etc.) will not be supported.

The EU contribution indicated in the grant is calculated and based on planned secondments eligible for funding. The final payable amount of the MSCA Staff Exchanges project will be proportional to the performed eligible secondments during the project's lifetime. The maximum number of secondments eligible for funding is 360 person-months. Moreover, in case of same sector secondments in Member States/Associated Countries, the 1/3 rule will be calculated based on the total secondments eligible for funding declared.

## **5. Instructions for completing Part A and Part B of the proposal**

The MSCA Staff Exchanges proposal template can be downloaded from the [call page](#) on the [Funding & Tenders Portal](#). All instructions for completing parts A and B of the proposal are embedded in the template and should be removed before proposal submission. A clean version is also available at the end of the template.

The [list of MSCA keywords](#) as well as guidance material can be found on the [REA website](#). The keywords will help REA to identify the most qualified and suitable experts to evaluate the submitted proposals.

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<sup>13</sup> See section 1 for definition.

In the Electronic Submission Service, the applicant chooses the panel to which the proposal will be associated at proposal stage (using the field "Scientific Panel" in section 1 of the proposal submission forms) and this should be considered as the core discipline. Additional keywords are used to define the other disciplines that may be involved. Selected keywords may also be used in the assessment of the *interdisciplinarity* of secondments and may influence the eligibility of some sector secondments between Member States/Associated Countries.

All eligible proposals will be evaluated under one of the eight major areas of research (known as "scientific panels"): Chemistry (CHE); Social Sciences and Humanities (SOC); Economic Sciences (ECO); Information Science and Engineering (ENG); Environment and Geo-Sciences (ENV); Life Sciences (LIF); Mathematics (MAT), and Physics (PHY).

Experts will evaluate all proposals under a given panel. Each panel will establish a ranked list of proposals for funding.

Proposals must be submitted to only one of the eight scientific panels.

As a general rule, the call budget will be distributed between the panels based on the proportion of eligible proposals received in each panel.

To help applicants select the most relevant panel for their proposal, a document providing a breakdown of each research area into a number of **keywords** is available on the [REA website](#).

Regarding the keywords, applicants can select from three to five as explained below. Applicants must:

1. Select the panel, i.e. the area of research (e.g. CHE) in which the proposal best fits, in section 1 of the proposal submission form (or earlier at step 3). This should be considered as the core discipline of the proposal.
2. Within the most relevant sub-area of research (e.g. C1-Inorganic Chemistry), select the first keyword that best characterises the subject of the proposal (e.g. Catalytic materials).
3. The second keyword that best characterises the subject of the proposal must be selected within the area of research (e.g. CHE) that has been selected in step 3 or in section 1.
4. Third keyword: it is mandatory to select at least one additional keyword, which can be chosen from any of the eight scientific panels.
5. If needed you may add further two additional keywords chosen freely from any of the eight scientific panels.

Please note that you should select the keywords in order of importance, the first being the most important.

Templates of the Letter of Commitment (for associated partners) are available at the end of the proposal template.