

Coordinators' Information Day

MSCA Doctoral Networks
HORIZON-MSCA-2024-DN-01

Michaela BITSAKIS

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Recruitment

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Julien GIORDANI

Best practices for recruitment

Open and transparent recruitment



- ✓ Publish on **Euraxess** and beyond
- ✓ **Promote the positions widely** to attract top global talent
- ✓ Be clear: include the **gross salary amount** and use the correct Country Correction Coefficient (CCC)



Excellence first

- ✓ Follow a **merit-based, transparent process**
- ✓ Avoid conflicts of interest – align with the Code of Conduct for the Recruitment of Researchers
- ✓ Selection must be **fair, open and well-documented**



Best practices for recruitment

Start Early, Stay Ahead



- ✓ Recruitment takes time – make sure to **plan well in advance**
- ✓ Obtaining a **visa** and other **administrative processes** can cause delays
- ✓ Use a **semi-centralised** recruitment & establish a **reserve list of candidates**



Respect the eligibility conditions

- ✓ **No doctoral degree** at the time of recruitment
- ✓ Respect the **MSCA mobility rule**

Contracting & working conditions

Contracting & working conditions

Choose the right contract

- ✓ **Full-time employment** or equivalent direct contract
- ✓ Must include **full social security and pension rights**
- ✓ This is a **cost eligibility condition**

Speak their language

- ✓ **Translation** of the contract is mandatory
- ✓ Helps to ensure understanding and compliance

Follow the MSCA rules

- ✓ Certain **MSCA-required elements must be in the contract** (see factsheet)
- ✓ Ensure that your institution's HR team are aware



Contracting & working conditions

Pay what is due

- ✓ Doctoral Candidates (DCs) must be **paid all MSCA allowances**
- ✓ These allowances are subject to **taxation**
- ✓ Ensure proper financial planning & keep supporting documents

Support DCs

- ✓ **HR** teams must actively support the DCs
- ✓ Provide clear information on salary, benefits, rights & obligations
- ✓ Provide administrative support

Academic & physical hosting

- ✓ **PhD enrolment** is mandatory
- ✓ DCs must be **physically hosted** at the beneficiary's premises
- ✓ Ensure local integration and supervision



Grant Agreement (GA) obligations

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Polyxeni MELIDOU

What is the Grant Agreement (GA)?



The **GA** is a
**contract between
all beneficiaries
and the EU**

It defines the **rights and
obligations** of all parties

It also sets **specific
rules for carrying out
the project**

These rules regulate the
**recruitment,
contracting and
working conditions** of
DCs.



GA obligations

One team, one responsibility

- ✓ The entire consortium is **jointly responsible** for implementing the project
- ✓ Project implementation should be done in compliance with:
 - **Annex 1**
 - **the GA**

Ensure audit preparedness

- ✓ All beneficiaries need to **keep supporting documents** to prove proper implementation
- ✓ Proof of compliance is essential in case of **audits** or **reviews**

Communication with REA

- ✓ The **Coordinator** is the **sole contact point** with REA
- ✓ Ensure timely and clear communication with REA



GA obligations

Cost eligibility

- ✓ **Some GA obligations define cost eligibility**
- ✓ Example: breaching the **mobility rule** → **costs rejected**
- ✓ **Rejection** of costs applies at the **beneficiary level**
- ✓ Financial liability is individual

Other non-compliance risks

- ✓ Some GA breaches do not affect cost eligibility directly
- ✓ Example: non-inclusion of the mandatory content within the contract
- ✓ But non-compliance can lead to other measures such as grant reduction (at beneficiary level)

Worst-case scenarios

Major breaches can lead to:

- ✓ **Suspension** of payments
- ✓ **Termination** of a beneficiary
- ✓ **Termination** of the entire Grant Agreement



Finance

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Edward RICKETTS

Understanding the MSCA EU contribution



What the EU funding covers

- ✓ The EU contribution is based on **unit costs** per **person-month (PM)**
- ✓ **1 person-month = 1 unit = 1 calendar month = 1-month eligible Doctoral Candidate**
- ✓ **Pro-rata** calculation applies, if the period is shorter

- ✓ **Salaries** of the DCs
- ✓ **Project implementation costs**

Thus two cost categories:

- ✓ Contributions for recruited researchers
- ✓ Institutional contributions (to support training, supervision, networking)



EU funding and eligibility of costs

When are costs eligible?

- ✓ When they comply with the key **MSCA requirements** (see factsheet)
- ✓ For the **institutional** costs to be considered eligible, it is sufficient that the **recruited researchers comply with the eligibility conditions**

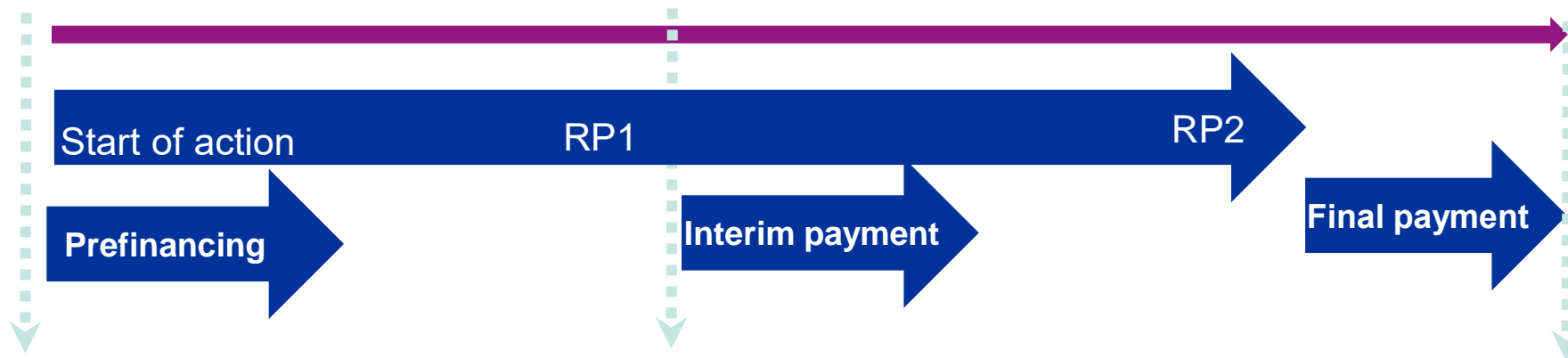
- ✓ **Institutional costs** are used to help the consortium implement the project for the benefit of the recruited researchers (these costs are not checked)
- ✓ This is why the eligibility of institutional costs is linked to the eligibility of the MSCA researchers

Who manages what?

- ✓ **DCs** must be paid the **MSCA allowances** (as defined in the MSCA Work Programme)
- ✓ DCs do not manage the budget for the research and training activities
- ✓ This budget is managed by their recruiting institution



How payments work



- ✓ To launch the project work, the consortium will receive a **pre-financing, which amounts to 80%** of the total EU contribution.
- ✓ The project is divided into **two periods**. **Two additional payments** will be made: one after the end of each reporting period, **if the project has been implemented as planned, if all incurred costs are eligible and if all MSCA requirements have been met.**



Reporting

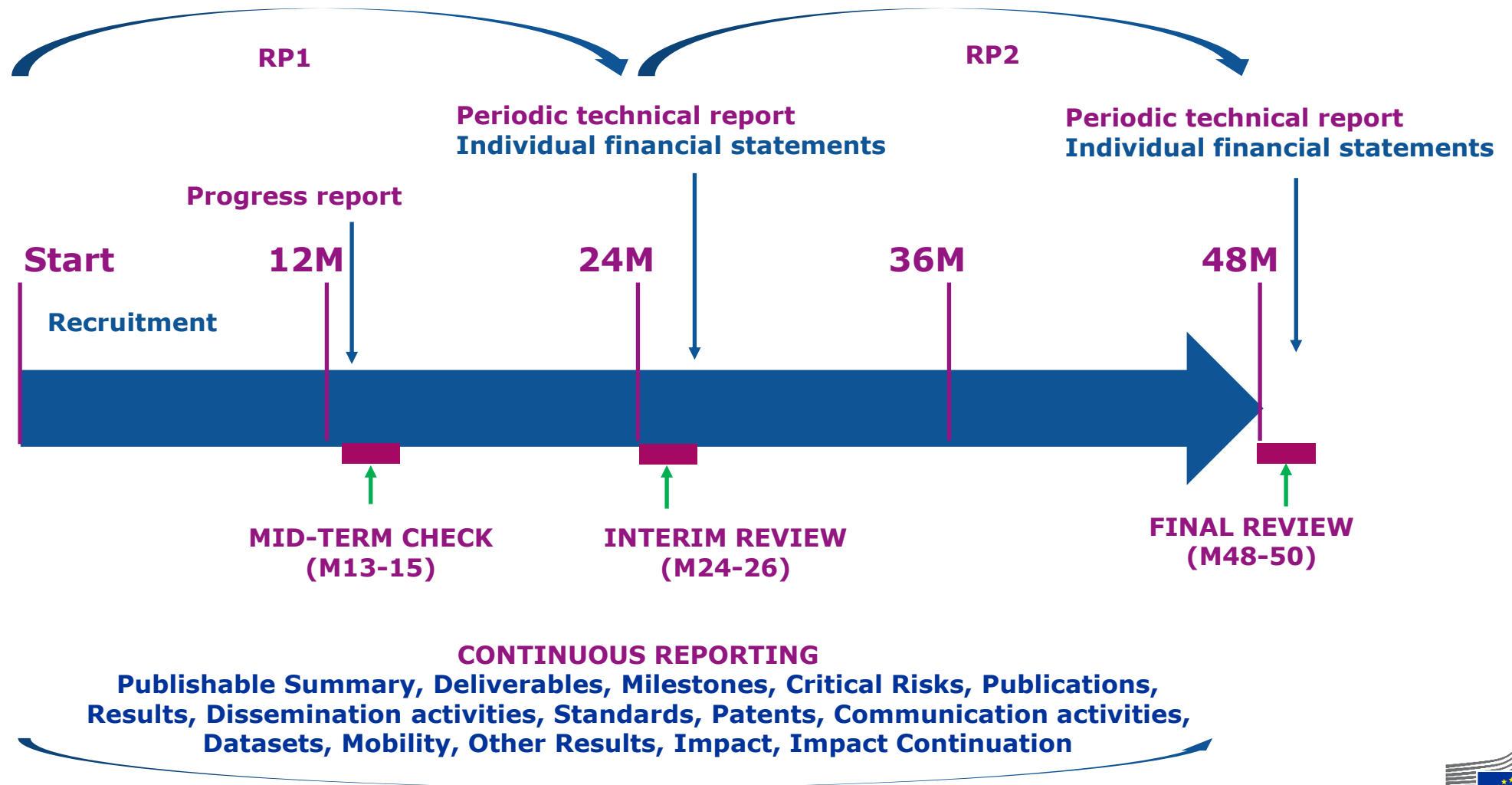
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Domna PASCHALIDOU

Project timeline



Why reporting matters

No report, no payment



- ✓ Payments are conditional: **you must report to REA**
- ✓ Reporting shows **project progress** and **compliance**
- ✓ This is not just for administrative purposes — this is your key to continued funding



Two types of reporting

- ✓ **Continuous reporting** runs throughout the project
- ✓ **Periodic reporting** is submitted at the end of each period
- ✓ Both are managed via the **EU Funding & Tenders Portal**



What you report continuously

- ✓ **Achievement** of your **deliverables, milestones** and other cross-cutting activities (via the continuous reporting)
- ✓ **Information about your recruited researchers**
- ✓ This is done via the **Mobility Declaration**



RESEARCHERS

Encoding of researchers' **personal details**. Serves as **database** from which **Mobility Declarations** can be automatically prefilled



MOBILITY DECLARATIONS

The **Mobility Declaration** links the researcher to the **recruiting institution & specifies the recruitment period(s)**



SECONDMENTS

Secondments are additional periods of research training with **another beneficiary or associated partner** (to be encoded as well)

Mobility Declarations & Financial Statements

Why Mobility Declarations matter

- ✓ The **Mobility Declaration** enables **automatic calculation of the person-months**
- ✓ One declaration **per recruited researcher**
- ✓ Must be submitted by **each beneficiary**

From declaration to reimbursement

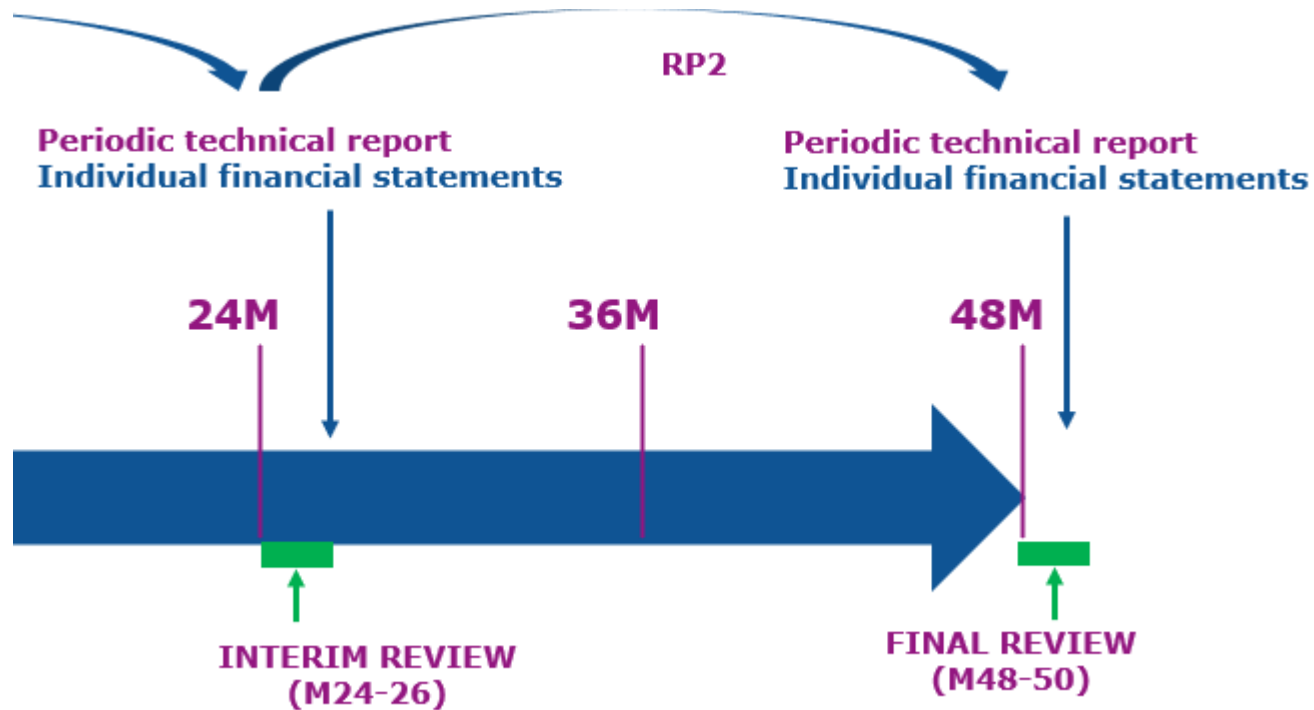
- ✓ The Mobility Declaration becomes the **basis** for:
→ **The Individual Financial Statement (IFS)**
- ✓ An IFS is submitted by **each beneficiary** at the **end of each reporting period**

Key reminders

- ✓ Submit the Mobility Declaration **promptly** (20 days after recruitment)
- ✓ Double-check dates, host organisation information and compliance with the mobility rule
- ✓ Missing or late declarations = delayed or ineligible payments



Projects reviews (end of period)



- ✓ **Objective:** assess project's progress via an **interim / final review**
- ✓ **When?** At the **end of each reporting period**
- ✓ **Based on what?**
 - the submitted technical report
 - the submitted individual financial statements
- ✓ Can be carried out with the help of an **external expert**

Outcome of the review assessment

REPORT ACCEPTED: payment
released

REPORT REJECTED: request for
revisions or additional information.

Once revisions are accepted by
REA, the payment is released.



Audits

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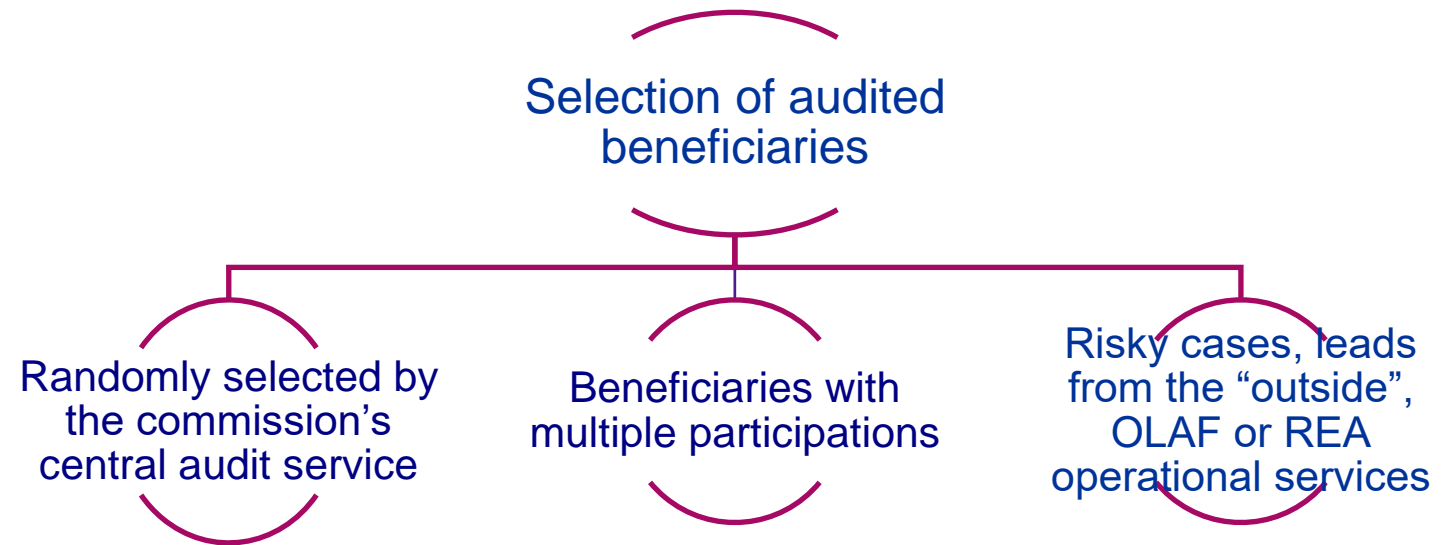
Shana IMPENS

Audit purpose & selection of beneficiaries

Purpose

- ✓ To check the **eligibility of the recruited Doctoral Candidates** and the eligibility of the reimbursed contributions
- ✓ To check compliance with the **MSCA specific requirements**

Selection of beneficiaries



Maintaining Records



Why record-keeping matters?

- ✓ It is a legal obligation
- ✓ Beneficiaries need to keep **appropriate and sufficient evidence** to prove the proper implementation of the project
- ✓ Record-keeping is used to support audits, checks, reviews, litigations, etc.



Retention period

- ✓ Supporting documents need to be kept in file for **5 years**

Key documents to keep



The employment contract of the DCs

Proof of their eligibility
(e.g. CVs, diplomas,
recruitment procedure,
etc.)

Proof that all MSCA
requirements are met

Proof that all MSCA allowances
were paid to the DCs, as well as
social security contributions
(e.g., payslips, bank statements)

Proof that DCs worked
on the project (e.g., lab
books, timesheets,
library records)

Recurrent issues

Eligibility of costs

- ✓ **Underpayments** of researchers
- ✓ **Wrong encoded PMs** in the Mobility Declaration
- ✓ Costs not **related to the action**

MSCA requirements

- ✓ MSCA requirements missing from the contract
- ✓ Vacancies not properly advertised
- ✓ DCs unaware of European Charter for Researchers & the Code of Conduct for the Recruitment of Researchers

Record-keeping

- ✓ Vague documentation not justifying the costs claimed

**Good record-keeping =
smooth audits, no
surprises**



Communication, Dissemination & Exploitation

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Ioanna PEPPA

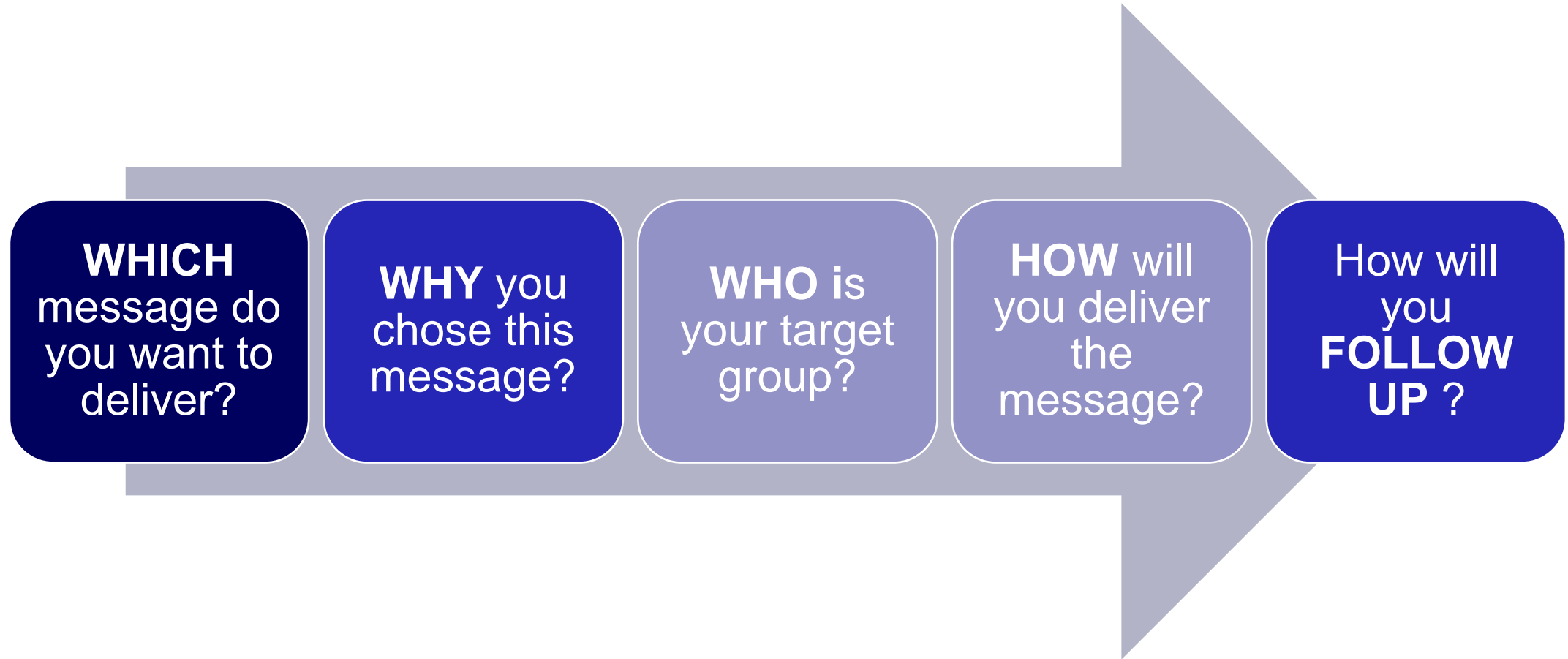
What's in it for you?

A smart communication, dissemination, and exploitation plan maximises the impact of your projects results and empowers every researcher involved.

It also boosts visibility, accelerates knowledge transfer, fosters new collaborations, and opens doors to future funding and business opportunities.



Make a tailored plan



Recommendations

EU tools

- ✓ Explore the free dedicated **EU platforms** to identify other related projects for future collaborations (i.e. **CORDIS**)
- ✓ Use other tools like the **Horizon Results Booster** and the **Horizon Results Platform** which are designed to showcase your results



- ✓ Make sure to always **acknowledge the EU funding**
- ✓ And to display the **EU emblem**

Tips

- ✓ Inform your **project officer** of significant activities and events
- ✓ Participate in **events** (i.e. Science is Wonderful, European Researchers Night, Science Fairs).
- ✓ Create videos, animations, children's books



Open Science

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Shana IMPENS

Responsible Research Data Management

Open science



- ✓ Open Science is about making research accessible, reusable, and trustworthy — from day one!
- ✓ Develop and regularly update a **Data Management Plan (DMP)**
- ✓ A **DMP** is not red tape - it is your roadmap to making use of your data
- ✓ Keep it updated, keep it smart: “As open as possible” vs “as closed as necessary”

Responsible data, real impact

- ✓ **Trusted repositories, clear licensing,** and **reusable formats** are not optional — they are required

All data must be **FAIR**:



Findable



Accessible



Interoperable



Reusable

If it's not FAIR, it's not shareable. And if it's not shareable, it's not impactful!



Open access



Open access to scientific publications:
No embargo, no excuse

- ✓ All your **peer-reviewed publications?**
They must be **open** — **immediately**.
That is the MSCA rule
- ✓ Just open knowledge with the **right license**: CC BY, CC BY-NC, or equivalent



Open access to research data

- ✓ Don't bury your datasets. Share research data as openly as possible, but as closed as necessary
- ✓ Share them wisely — in trusted repositories like Zenodo, or within institutional data repositories

Synergies

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Audrey ARFI

What are synergies?

✨ When programmes join forces, impact multiplies: it's not only about funding!

Complementary funding

Bringing together funding from different programmes

i.e., COFUND

Sequential funding

Projects that build on each other at different stages of research or innovation

i.e., Erasmus+ and MSCA

Alternative funding

Taking up high quality proposals from other programmes

i.e., Seal of Excellence

Complementarity of parallel projects

i.e., InnoNext

Synergies



How to create synergies?

- ✓ **Networking** can often kickstart productive linkages
- ✓ Many **new initiatives in the HE work programmes**
- ✓ Examples: **European Innovation Council** Innovation Talent scheme, **European Institute of Innovation & Technology**



Why?

- ✓ **Benefits at every level**
- ✓ For participating institutions, the MSCA programme and Europe as a whole: exchange of best practices, streamlined applications, increased visibility and broader impact

Good practices to be considered

Examples

Encourage supervisors across projects to foster PhD/post-doc collaboration and joint publications

Establish platforms (i.e. shared repository, open data policy) to facilitate knowledge exchange

Co-organise workshops/trainings that bring together students from other existing MSCA Doctoral Networks (or Initial Training Networks, as known previously)

Use research findings to initiate new projects and partnerships

Identify related EU & non-EU projects, exchange results and build collaborations to maximise impact during and after your project

Have a dedicated university department that centralises EU grant information, organises regular project presentations, and works with HR/Communications on trainings for recruitment and dissemination.

Thank you



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Factsheets

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Factsheets

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- ❖ **Grant Agreement (GA) Obligations**
- ❖ **Finance**
- ❖ **Reporting**
- ❖ **Communication, Dissemination & Exploitation**
- ❖ **Open Science**
- ❖ **Synergies**
- ❖ **Industrial Doctorates**
- ❖ **Joint Doctorates**
- ❖ **Audits**