MSCA COFUND
2023 Call
Marie Skłodowska-Curie Actions
Marie Skłodowska-Curie Actions

- Based on mobility (international, intersectoral, interdisciplinary);
- All scientific domains;
- Strong accent on participation of industry, SMEs and non-academia partners;
- Attract and retain talents
- Institutional visibility and networking
- Joint advanced training
- @ interfaces of the knowledge value-chain
Marie Skłodowska-Curie Actions

Doctoral Networks
- Joint Doctorates
- Industrial Doctorates
- Other Doctoral Programmes

Staff Exchanges
- Secondments Inter-sectoral | -national | -disciplinary

Co-funded Programmes: Doctoral and Postdoctoral

Pillar I: MSCA

Postdoctoral Fellowships
- European Fellowships
- Global Fellowships

MSCA & Citizens

Yearly Event

COFUND

Citizens
Marie Skłodowska-Curie Actions – 2023 calendar

**Doctoral Networks**
- Opens: 30 May’23
- Closes: 28 Nov.’23

**Postdoctoral Fellowships**
- Opens: 12 Apr.’23
- Closes: 13 Sep.’23

**Staff Exchange**
- Opens: 05 Oct.’23
- Closes: 28 Feb.’24

**MSCA & Citizens**
- Opens: 20 Jun.’23
- Closes: 25 Oct.’23

**COFUND**
- Opens: 10 Oct.’23
- Closes: 08 Feb.’24
Marie Skłodowska-Curie Actions – 2024 calendar

**Doctoral Networks**
- Opens: 29 May’24
- Closes: 27 Nov.’24

**Postdoctoral Fellowships**
- Opens: 10 Apr.’24
- Closes: 11 Sep.’24

**Staff Exchange**
- Opens: 10 Oct.’24
- Closes: 05 Mar’25

**MSCA & Citizens**
- No call foreseen in 2024

**COFUND**
- Opens: 08 Oct.’24
- Closes: 06 Feb.’25
COFUND Basics

➢ Complementary funding for new or existing national, regional, and institutional schemes for doctoral and postdoctoral programmes managed by entities established in EU MS or HE AC

FOCUS on:

- Spread best practices of the MSCA by promoting high standards in the recruitment process and excellent working conditions (European Charter for Researchers and Code of Conduct for the Recruitment of Researchers).
- Introduce sustainable structuring effects, by promoting excellent and sustainable research training, international, intersectoral and interdisciplinary cooperation and mobility.
- Encourage synergies with Cohesion policy funds as well as the Recovery and Resilience Facility.
- Proposed programmes are encouraged to cover all research disciplines ("bottom-up"), but can also focus on specific disciplines (based on RIS3 strategies).
Synergies with other funds

Encourage synergies with other Funds

• FP, Area of intervention: Improving and Facilitating Synergies;

• WP Introduction: The MSCA promote the creation of strong links with the European Regional Development Fund (ERDF) and European Social Fund (ESF+) and the Recovery and Resilience Facility (RRF), notably by creating synergies through its COFUND action

• enabling complementarities via awarding a Seal of Excellence (+ 85) certificate to proposals submitted to mono-beneficiary MSCA calls.
Proposals are submitted by the co-financing institution - private and public organisations that fund or manage doctoral programmes or fellowship programmes for researchers

Application as a single legal entity (mono-beneficiaries)

Duration

- Programme max. 60 months
- Fellowship min 3 months
- Secondment up to 1/3 of the fellowship duration

TARGET GROUPS

- Doctoral candidates - researchers without a doctoral degree at the deadline of the co-funded programme's call; **mandatory enrolment in a doctoral programme**
- Postdoctoral researchers - researchers with a doctoral degree at the deadline of the co-funded programme's call

How COFUND works

1. MS /AC organisation is applying for the COFUND call (doctoral or postdoctoral programme)
2. EC funds COFUND programme
3. MS /AC organisation (beneficiary) advertises job/funding vacancies on EURAXESS portal
4. Beneficiary/Implementing partners recruit researchers
## Beneficiary, Associated Partner, Implementing Partner

<table>
<thead>
<tr>
<th>Role in the training for Doctoral and Postdoctoral</th>
<th>Recruitment of researchers</th>
<th>Training and/or Hosting of Seconded Researchers</th>
<th>Directly claim unit costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beneficiary</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Associated Partner</td>
<td>X</td>
<td>✓</td>
<td>X</td>
</tr>
<tr>
<td>Implementing Partner</td>
<td>✓</td>
<td>✓</td>
<td>X</td>
</tr>
</tbody>
</table>
MSCA COFUND – possible structures
1 - Hierarchical
MSCA COFUND – possible structures
2 - Horizontal
MSCA COFUND – possible structures
3 – Single point

We do everything!
MSCA COFUND

- **Co-funding**
  - Max 10 M€ per beneficiary per call

- **Duration**
  - **Programme**: max. 60 months
  - **Fellowship**: min 3 months

- **Recruitment**
  - Euraxess
Eligible researchers:

• **Doctoral programmes**: researchers without a doctoral degree at the deadline of the co-funded programme's call; mandatory enrolment in a doctoral programme

• **Postdoctoral programmes**: researchers with a doctoral degree at the deadline of the co-funded programme's call

• **Any nationality**

• **Mobily rule**: must not have resided or carried out main activity in the country of the recruiting beneficiary for more than 12 months immediately before their recruitment date
MSCA COFUND 2021 call

Submitted eligible proposals
(115 in total)

- DOCTORAL PROGRAMMES
- POSTDOCTORAL PROGRAMMES

62
53
MSCA COFUND 2021 call

Type of Organisations for Coordinators
(for all 115 participants)

<table>
<thead>
<tr>
<th>Type of Organisations</th>
<th>Funded</th>
<th>Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher or Secondary Education</td>
<td>17</td>
<td>71</td>
</tr>
<tr>
<td>Research Organisations</td>
<td>6</td>
<td>31</td>
</tr>
<tr>
<td>Private for Profit</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Public Body</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>7</td>
</tr>
</tbody>
</table>
MSCA COFUND 2021 call

**Submitted-Funded-Reserve list for eligible proposals**
(for 115 eligible proposals)

<table>
<thead>
<tr>
<th></th>
<th>DOCTORAL PROGRAMMES</th>
<th>POSTDOCTORAL PROGRAMMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funded</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Reserve List</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Submitted</td>
<td>53</td>
<td>62</td>
</tr>
</tbody>
</table>
MSCA COFUND 2021 call
MSCA COFUND 2021 call

Success rate by panels

<table>
<thead>
<tr>
<th></th>
<th>DOCTORAL PROGRAMMES</th>
<th>POSTDOCTORAL PROGRAMMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Success rate</td>
<td>24.53%</td>
<td>20.97%</td>
</tr>
</tbody>
</table>
MSCA COFUND 2021 call

Country participation in COFUND 2021 main list (EU MS & AC)
### COFUND 2022 call

**Doctoral - Submission per country MS (vs COFUND 2021)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of Proposals Doctoral 2021</th>
<th>Number of Proposals Doctoral 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>BE</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>BG</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>CY</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>CZ</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>DE</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>DK</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>EE</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>ES</td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>FI</td>
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<tr>
<td>FR</td>
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<td>18</td>
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<tr>
<td>HU</td>
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<td>1</td>
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<tr>
<td>IE</td>
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<td>2</td>
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<tr>
<td>IT</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>NL</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>PL</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>SE</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>SI</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>

The chart above visualizes the number of doctoral proposals submitted per country in 2021 and 2022, comparing COFUND 2021 to COFUND 2022.
COFUND 2022 call

Postdoctoral - Submission per country MS (vs COFUND 2021)
COFUND 2022 call

Success rate MSCA COFUND (per participant)

Success PT: only as “implementing partner”, not having any success as coordinator/beneficiary
Proposal submission

MSCA COFUND
• Applications are submitted through the Funding and tender opportunities portal:
  • Find your call
  • Sign into the portal and register your organization (get a PIC number)
MSCA COFUND – proposal submission

- **2 submission links**, 1 per modality (Doctoral and Postdoctoral programmes)
COFUND Proposal Structure

Part A - administrative forms
filled on-line on the Funding & Tenders Opportunities Portal

Part B1 - the proposal, max 34 pages (PDF uploaded)
# Start page (1), table of contents (1), general description of the programme, information on the beneficiary (2 pages)
# Excellence
# Impact
# Implementation, incl. Gantt Chart

Part B2 - no page limit, PDF uploaded
# Ethics
# Partner organisations (role of partner organisations, ½ pg per associated/implementing partner)
# Letters of Commitment (compulsory for associated partners, recommended for implementing partners)

Maximum 30 pages

Excess pages disregarded
Proposal structure – part A

PART A:

✓ General information:
  • title,
  • acronym,
  • duration,
  • panel,
  • descriptors,
  • keywords,
  • abstract,
  • declarations

✓ Participants and contacts

✓ Budget: EC contribution+other resources

✓ Gender Equality plan

✓ Ethics & security questionnaire

Administrative forms – to be filled on-line
Part A - GEP, Ethics and questions

A self-declaration will be requested at proposal stage

If you are a public body, a research organisation or a higher education establishment (including private research organisations and higher education establishments), then you must have a Gender Equality Plan.


Questions related to completing part A of your proposal → EC FAQ section here and MSCA-NET Q&A blog here
How to select keywords in a Horizon Europe MSCA COFUND?

✓ All eligible proposals will be evaluated under one of the eight major areas of research (known as scientific evaluation "panels")

✓ Experts will evaluate all proposals under a given panel.

✓ Each panel will establish a ranked list of proposals for funding.

✓ In the Electronic Submission Service, the applicant chooses the panel to which the proposal will be associated at the 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.

✓ Proposals must be submitted to only one of eight 'main evaluation panels'.

✓ Applicants should carefully choose the panel and keywords since this will guide the REA in the selection of experts for proposal evaluation.

✓ 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 (3) to five (5) 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 forms (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 (1) additional keyword which can be chosen from any of the eight (8) areas of research.

5. If needed you may add further two (2) additional keywords chosen freely from any of the eight (8) areas of research.

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

Proposal structure – layout

- **Be sure to use the EC template!**
- Page size A4
- Legible font (Times New Roman)
- The minimum font is 11 except for Gantt charts and tables where it can be 9
- Literature references: listed in footnotes, min. font size 8
- Single line spacing
- Margins 15 mm (top, bottom, left and right)
- Pages must be numbered - footer - "Part B - Page X of Y"
Layout – general advice

Not evaluated but makes life easier for the evaluators

✓ Use charts, diagrams, tables, text boxes, figures
✓ Ensure any colour diagrams etc. are understandable when printed in black and white
✓ Use highlighting where appropriate (bold, underline, italics) but don’t overdo it!

✓ Avoid jargon
✓ Explain any abbreviations
✓ Simple and clear text
✓ Avoid long sentences
✓ Get rid of repetitions (refer to other parts of the proposal if necessary)
✓ Don’t copy text from other documents or websites
✓ Be consistent with language (UK/US English)
Gender and other diversity aspects

Eligibility: Gender Equality Plan

Award Criteria: Integration of the gender dimension

Ranking Criteria: Gender balance
Award criteria

MSCA COFUND
<table>
<thead>
<tr>
<th>Excellence</th>
<th>Impact</th>
<th>Quality and efficiency of the implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality and novelty of the selection/recruitment process for the researchers (transparency, composition and organisation of selection committees, evaluation criteria, equal opportunities, the gender dimension and other diversity aspects) and quality and attractiveness of the appointment conditions, including competitiveness of the salary for the standards of the hosting countries</td>
<td>Strengthening human resources good practices at institutional, regional, national or international level, in particular through aligning the practices of participating organisations with the principles set out by the EU for human resources development in research and innovation</td>
<td>Quality and effectiveness of the work plan, management structures, assessment of risks and appropriateness of the effort assigned to work packages</td>
</tr>
<tr>
<td>Quality and novelty of the research options offered by the programme in terms of science, interdisciplinarity, inter-sectorality and level of transnational mobility. Quality of open science practices</td>
<td>Credibility of the proposed measures to enhance the career perspectives and employability of researchers and contribution to their skills development</td>
<td>Quality and capacity of the host institution(s) and participating organisations (where appropriate), including hosting arrangements and extent to which they bring together the necessary expertise to successfully implement the research training programme</td>
</tr>
<tr>
<td>Quality, novelty and pertinence of the research training programme (including transferable skills, inter-multidisciplinary, inter-sectoral and gender as well as other diversity aspects)</td>
<td>Suitability and quality of the measures to maximise the expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities</td>
<td></td>
</tr>
<tr>
<td>Quality, novelty and pertinence of the supervision, career guidance and career development arrangements</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 50% | 30% | 20% |
MSCA COFUND – award criteria

Excellence: main novelties

1.1 Quality and novelty of the selection/recruitment process for the researchers
   • Gender dimension and diversity aspects
   • Appointment conditions of the researchers (moved from implementation in H2020)

1.2 Quality and novelty of the research options offered by the programme
   • Quality of open science practices
1.1 STRENGTHS & WEAKNESSES

The selection process is overall of very good quality, the transparency of recruitment process is convincingly demonstrated in terms of international dissemination, high variety of channels, including networks for female researchers, support and relative documentation provided to the candidates. The key performance indicators showing effectiveness of the process are properly in place.

There is a clear attempt to prevent gender bias in the selection process by anonymising cvs and also to eliminate socio-economic inequalities by providing travel costs or alternative online arrangement for interviews, which is a strength.

The attractiveness of the appointment and working conditions of the fellows is demonstrated, in comparison with similar locally supported positions.

A good redress mechanism is envisaged for applicants dissatisfied with aspects of the selection process.

The dissemination of the calls is wide and effective, internationally announced, comprehensively developed in strong liaison with Partners, and building on the beneficiary’s experience from a similar project previously funded.

The proposal does not clearly substantiate sufficient involvement of independent international experts in the interview panels and, in addition, the interview scoring procedure lacks clarity.

The one stage evaluation process, assessed by two evaluators without interviews held and without consensus meetings presented, lowers its overall transparency.

The recruitment process is outsourced to a third-party organisation which can help to make the selection workflow neutral and transparent. However, there is not enough information provided about the actual workflow or role of different actors within that organisation to give a clear picture of the recruitment process.

There are not enough details provided on the evaluation criteria with regard to the separate round of interviews of candidates with group leader prior to the interview with the evaluation committee. A clear justification for the inclusion of earlier entrepreneurship or leadership experience in the evaluation criteria is not provided; given the career stage, this criterion will limit recruitment of attractive candidates.

The exception from the mobility rule is not in line with the COFUND-rules and it is not convincingly argued how many fellows might be recruited under these conditions.
1.2 STRENGTHS & WEAKNESSES

Open access practices will be appropriately implemented through data deposition on online platforms and repositories in accordance with the provisions included in the horizon europe programme.

The proposed research focuses on the Sustainable Development Goals with the three transversal areas that offer excellent themes for novel interdisciplinary research options. Interdisciplinarity is further strengthened by the compulsory secondment at XX and the optional secondments at associated partners.

The programme demonstrates a strong triple-i dimension through the choice of an inherently interdisciplinary research theme, extensive connections to relevant leading eu research networks, and involvement of several digital startups as associated partners, part of which were established by the host organization’s faculty or alumni.

The commitment of the beneficiary to operate the programme under a recognised green charter for sustainability in science is an asset of the proposal.

- Strengthening the 3"i"s is not convincingly demonstrated as not all of these aspects are required to be included in the design of the proposed research projects.

International mobility is insufficiently specified and not supported through specific actions. Interdisciplinarity is limited to exchanges and workshops, but is not an integral part of the research itself.

The inter-disciplinary aspects of the programme are not convincingly exposed; simply enumerating the involved disciplines is not sufficient.

Connections with the industrial partners and how the fellows will be involved in collaborations are not well outlined.

There is limited information provided on how the societal elements of the open science practices (beyond the awareness raising process) will be addressed. This is more important when the proposal’s research domains are of high importance/interest for society.
MSCA COFUND – award criteria

Excellence: main novelties

1.3 Quality, novelty and pertinence of the research training programme (including transferable skills, inter/multidisciplinary, inter-sectoral and gender as well as other diversity aspects)

1.4 Quality, novelty and pertinence of the supervision, career guidance and career development arrangements

• Career development (moved from impact in H2020)
1.3 STRENGTHS & WEAKNESSES

The training programme includes training in a set of pertinent transferable skills along with interdisciplinary research training in the corresponding knowledge areas.

The non-academic partners have a clear and meaningful involvement in the training activities, with participation in various courses by patient associations, science communication and career development experts, and founders of start-up companies.

The gender aspects are well detailed, and a good strategy is presented. All partners are strongly committed to promote gender equality and inclusiveness at all levels through dedicated training sessions, events and actions designed to specifically to support and foster the career development of under-represented groups.

The research training programme is comprehensive, novel, and high-quality, including a suitable focus on open science, research dissemination, and transferable skills.

The research training programme is well structured and thoroughly described with information on the timings and duration throughout the programme.

Training in respect to ethics in research is not clearly integrated into the training programme, which is important given the research options offered by the programme. Further, the proposal insufficiently addresses how the quality of the training courses will be measured/monitored.

The described planned role and contribution of the partners from the non-academic sector, as presented in their letters of commitments, is not properly echoed by the proposed training activities as presented in the proposal.

The transferable skills training is insufficiently illustrated, e.g. aspects on equality and diversity and entrepreneurship. Further it suffers from a lack of structure, quantifiable indicators and monitoring elements.

Information for the non-academic and industrial partners on their role in training is not sufficiently detailed, notably for those outside the Host country.

The expected balance between compulsory and optional training activities is not entirely clear in the proposal.
1.4 STRENGTHS & WEAKNESSES

Career planning is supported by a well-structured and appropriately monitored PCDP and access to a career development coach. The inclusion of an additional mentor that aligns with the next career step for the fellow and female-to-female mentoring are novel and beneficial features, providing additional independent career guidance.

The quality of the supervision is clear, with an identified pool of potential Supervisors at the host Partners, with extensive experience in postdoctoral supervision, a demonstrated record of research leadership, and extensive experience with EU projects.

Regularly monitored Personal Career Development Plans are suitably integrated with the supervision and at a convenient pace. Fellows have access to the Career Centre for services on competencies and management skills.

The organization and the frequency of the meetings with the supervisory team is appropriate.

Career and Training Committee composition is well structured and balanced for training in both academic and non-academic domains.

The supervision and career guidance arrangements are insufficiently developed and not innovative. The programme sets a goal that at least a third of the recruited fellows should be co-supervised by mentors from outside the host organization without clarifying why broadened mentoring expertise and perspectives would not be necessary for the remaining fellows.

Quality and experience of (potential) academic supervisors are presented only in a generic manner; limited information is provided regarding the quality of non-academic supervisors with whom the doctoral students will work closely for at least half the duration of their fellowship.

The overly complex structure envisaged for supervision raises concern for the feasibility of effective supervision of the large number of proposed doctoral candidates.

Career guidance and career development arrangements are not sufficiently substantiated, the quality of the process itself is not sufficiently addressed.
Impact: main novelties

2.1 Strengthening human resources good practices at institutional, regional, national or international level, in particular through aligning the practices of participating organisations with the principles set out by the EU for human resources development in research and innovation

• Strengthening and aligning human resources practices

2.2 Credibility of the proposed measures to enhance the career perspectives and employability of researchers and contribution to their skills development
2.1 STRENGTHS & WEAKNESSES

+ The overall alignment with, and the concrete measures for, implementing the EU Charter and Code and Human Resources Strategy for Researchers are convincingly presented. It is worth mentioning that most of the implementing partners have been awarded the HRS4R label and the rest are in the process of obtaining it.

+ Earlier experience of participation of the consortium in EU research projects related to the human resources development in research, convincingly supports its capacity to strengthen human resources at different levels.

+ It is convincingly demonstrated that the programme will spread the good practices at the regional and national level.

+ The programme will strongly promote gender equality, organising specific training for female fellows on career opportunities and forming a network of female researchers with participation of women in science on a regional, national and international level.

+ The impacts of the programme at the various levels are duly considered and the programme will contribute to the region’s competitiveness and economic growth with a focus on the challenges identified in the regional innovation strategy for smart specialisation.

+ The proposed programme is very well thought out and it will produce synergies with EU funding invested in the previous years in research infrastructures and research capacity in the region.

- There is insufficient detail of how the programme will contribute to the human resources practices at the consortium level and also how this will be sustained beyond the project time line.

- The programme’s impact on promoting and propagating the EU principles of HR development in R&I is not well demonstrated at the international level due to insufficient integration of the associated partners via programme’s events and lack of a concrete secondment plan.

- The contribution of the program at the regional level is not sufficiently presented.

- The explanation of how human resources good practices will be achieved at the international level is very brief. The foreseen collaborations with international bodies are very wide and not fully detailed.
2.2 STRENGTHS & WEAKNESSES

+ The first-rate, innovative research options with high societal impact, the access to state-of-the-art facilities, the engagement in intersectoral activities, the broad and complementary training in scientific and transferable skills, as well as the strong networking opportunities will further foster the fellows’ career perspectives and employability in academia and the private sector.

+ Enhancement of career perspectives of ESR is highly credible, supported by collaborative opportunities, accelerated market access and reinforced recruitment of potential graduates by the industry.

+ The interdisciplinary nature of the programme and training in transferable skills will credibly make a strong impact towards contribution to the doctoral candidates skills development.

+ The proposed programme will empower the doctoral candidates with excellent scientific competences in the proposed field, and a diverse set of career-focused transferable skills.

+ A database with the CVs of all the applicants to the programme will be set up (if they agree), to support possible employment opportunities at one of the partners. This is very innovative.

- The proposal does not present appropriate measures for aligning the practices of the beneficiary and partner organizations with the principles set out by the EU for human resources development in research and innovation.

- The proposal does not sufficiently describe how the selected researchers can exploit the connections with the non-academic sector developed during the programme.

- The proposal does not provide clear information on how it effectively intends to support the fellows in the next step of their career.
Impact: main novelties

2.3 Suitability and quality of the measures to maximise the expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities

• dissemination and exploitation plan, including communication activities
2.3 STRENGTHS & WEAKNESSES

+ The programme has a sound policy in place for protection and potential exploitation of research results, in line with relevant national and EU regulations, and supported by appropriate institutional services and systematically monitored by the project manager.

+ The doctoral candidates will prepare a dissemination plan at the beginning of their employment contracts, which will evolve over the course of the programme.

+ The programme properly considers, promotes and implements Open Access, FAIR Data and Intellectual Property protection policies, in line with institutional and national regulations and Horizon Europe rules.

+ Specific bilateral agreements will be drafted before any secondments in the industry; this, together with the applicants’s extensive experience in IP management, will ensure an effective strategy for the management of the intellectual property.

+ The mandatory requirement in relation to the dissemination and the communication activities for the fellows is appropriate and the monitoring and technical support provided to them are well structured.

- The outlined dissemination and communication activities are not appropriately described and justified with dedicated Key Performance Indicators (KPIs).

- The strategy for dissemination and communication of project results are not presented in a convincing manner, for instance, lacking details on key elements such as clear time plan and target groups.

- The degree of involvement of the business sector in the career development of the PhD candidates is not clearly and convincingly presented.

- The communication activities are quite generic without clear details e.g. frequency or length of activities and who will contribute to them.

- A concrete strategy aimed at public engagement and reaching out the society is not elaborated and demonstrated in sufficient detail.

- The tech transfer plans are insufficiently elaborated.
Quality and efficiency of the implementation: main novelties

3.1 Quality and effectiveness of the work plan, management structures, assessment of risks and appropriateness of the effort assigned to work packages

• Work plan of the programme and the resources/work packages
• Management structures
• Risk management
An appropriate and self-explanatory Gantt chart showing the project timeline is presented, with well-described deliverables that allow easy monitoring of the project's progress.

The management structure is well designed, comprising clearly defined, credible, and non-overlapping roles and responsibilities.

The proposal correctly identifies and illustrates in a clear table the most important potential risks and obstacles associated with the implementation of the programme, their probability to occur, and associates them with realistic and appropriate mitigation measures.

Work packages and the work plan are sufficiently defined, and the effort assigned to the work packages is appropriate.

The contingency and mitigation plan does not cover all risks. For instance, risks related to the experience-based evaluation and update of measures towards best practices, or conflict between recruited researcher and supervisor,... are not properly considered.

Only very limited information is given on the management structures, the interactions between different management bodies, decision-making procedures, and financial management provisions, which impedes an effective implementation of the programme.

The risk assessment is not convincing as only a small number of risks has been identified.

In several aspects of the programme, the decision making mechanism is highly centralized for a single person with responsibility to other projects and duties, which affects the reliability of the management framework and capacity.
Quality and efficiency of the implementation: main novelties

3.2 Quality and capacity of the host institution(s) and participating organisations (where appropriate), including hosting arrangements and extent to which they bring together the necessary expertise to successfully implement the research training programme

• Quality and capacity of the participating organizations to implement the programme
Responsibilities of the participating organizations are correctly allocated. Letters of support indicate full commitment for the programme including financial contribution.

The beneficiary has sufficient quality and capacity to implement the proposed programme because it has a proven track record of managing an established postdoctoral fellowship schemes and previous COFUND-programmes.

The beneficiary demonstrates high competencies to implement the programme based, for example, on previous experience and appropriate administrative, technical and human resources. The research infrastructure and facilities that will be provided by the participating organisations are also very good.

The beneficiary’s commitment is proven by a high level of matching funds.

The hosting arrangements are suitable to support fellows in all phases of the process through well-organized administrative support services.

The proposal fails to satisfactorily introduce the expertise and experience of the key persons who will be responsible for the implementation of the programme at the beneficiary level.

The necessary measures and arrangements available for the potential host institutions during the implementation period are not convincingly described.

The infrastructure of the implementing and associated partners in the context of tasks allocated to them in the research training program is insufficiently elaborated.

The capacity of the participating organisations is not sufficiently explained and all the necessary expertise for the successful implementation of the project is not clearly identified. The exact role for some of the partner organisations is not clear as they are listed, but they neither offer hosting or training.

The commitment letter of associated partner organization participating in secondments states that the associated partner is free to decline the hosting of a fellow if it is not feasible at the time, which can put in risk the international dimension of the programme.

3.2 STRENGTHS & WEAKNESSES

+ Responsibilities of the participating organizations are correctly allocated. Letters of support indicate full commitment for the programme including financial contribution.

- The proposal fails to satisfactorily introduce the expertise and experience of the key persons who will be responsible for the implementation of the programme at the beneficiary level.

  - The necessary measures and arrangements available for the potential host institutions during the implementation period are not convincingly described.

  - The infrastructure of the implementing and associated partners in the context of tasks allocated to them in the research training program is insufficiently elaborated.

  - The capacity of the participating organisations is not sufficiently explained and all the necessary expertise for the successful implementation of the project is not clearly identified. The exact role for some of the partner organisations is not clear as they are listed, but they neither offer hosting or training.

  - The commitment letter of associated partner organization participating in secondments states that the associated partner is free to decline the hosting of a fellow if it is not feasible at the time, which can put in risk the international dimension of the programme.
Evaluation

MSA COFUND
MSCA COFUND – evaluation

Overview of the process

1. Receipt of proposals
   - Admission/eligibility check
   - Allocation of proposals to evaluators

2. Individual evaluation
   - Experts assess proposals individually.
   - Minimum of three experts per proposal (but often more than three).

3. Consensus group
   - All individual experts discuss together to agree on a common position, including comments and scores for each proposal.

4. Panel review
   - The panel of experts reach an agreement on the scores and comments for all proposals within a call, checking consistency across the evaluations.
   - If necessary, resolve cases where evaluators were unable to agree.
   - Rank the proposals with the same score

5. Finalisation
   - The Commission/Agency reviews the results of the experts' evaluation and puts together the final ranking list.
The priority order for ex-aquo proposals will be established as follows:

• Score awarded for the criterion ‘Excellence’

• In case of equality, scores awarded for the criterion ‘Impact’

• If necessary, the gender balance among named supervisors

• If a distinction still cannot be made, the panel may decide to further prioritise by considering other factors, such as:

  • gender and other diversity aspects in the research activities
  • participation of the non-academic sector (including involvement of SMEs)
  • geographical diversity
  • favourable employment and working conditions
  • relationship to the Horizon Europe objectives, in general.
Budget Structure

MSCA COFUND
Minimum remuneration applies:
EUR 2 800 for Doctoral researcher; EUR 3 980 for Postdoctoral researcher
MSCA COFUND – Total budget of the co-funded programme

- Applicants must specify in their proposal the total cost of their proposed programme and in particular the amounts that will be provided for the benefit of the researchers and for the organisation(s) that will implement the programme.
## MSCA COFUND –budget

<table>
<thead>
<tr>
<th>% beneficiary</th>
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<tbody>
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<td>30.84%</td>
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<td>63.76%</td>
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</table>

% of the beneficiary

**Examples from 2021 Main List**

*Average: 49%*

*Lowest: 30%*
Project implementation

MSCA COFUND
Each beneficiary/ implementing partner must recruit each eligible doctoral/postdoctoral researcher under an employment contract or equivalent direct contract with full social security coverage.

When an employment contract cannot be provided (due to national legislation), the beneficiary may exceptionally recruit the doctoral/postdoctoral researcher under a 'fixed-amount fellowship'. In this case, the living allowance will be halved and the beneficiary must ensure that the doctoral/postdoctoral researchers enjoys minimum social security coverage.
MSCA COFUND – project implementation

• **The selection of the researchers** must follow an open, transparent, merit-based, impartial and equitable selection procedure, with vacancies internationally advertised and published, including on the EURAXESS website. Selection must be based on international peer review for the postdoctoral programmes.

• **The training programme** shall offer a wide variety of opportunities for researchers to experience secondments (including intersectoral ones), to benefit from training in research or transferable skills, as well as from innovative and interdisciplinary elements of the proposed programme.

• Doctoral/Posdoctoral researchers should devote them on a **full-time basis** to the project.

• **Part-time** is allowed for personal or family reasons, with a prior agreement of the REA.
MSCA COFUND – project implementation

- Continuous reporting module
- Periodic reporting module

[Diagram showing project timeline with stages: Project starts, End period 1, End period 2, Final, Project ends]
MSCA COFUND – project implementation

Continuous reporting

At the start date of the project, the Continuous Reporting Module is activated and COO can contribute to it on an ongoing basis. During the project, COO is expected to provide regular updates on the status of the project.

The continuous reporting includes:

- progress in achieving milestones
- Deliverables (including the Mobility declarations)
- updates to the publishable summary
- response to critical risks, publications, communications activities
- IPRs
- programme-specific monitoring information (if required)
MSCA COFUND – project implementation

Reports & payment requests

• The **Periodic Report/Final Report** is the pre-condition for receiving payments; it must be submitted electronically **within 60 days after the end of the reporting period**.

• The **Report** is divided into a **technical** and **financial** report.

• The **Technical Report** consists of 2 parts:
  
  • **Part A** contains structured tables with project information. IT is automatically generated by the IT system and is based on the information entered into the Portal Continuous and Periodic Reporting modules.
  
  • **Part B** is a narrative description of the work carried out during the reporting period. Part B needs to be uploaded as PDF.
MSCA COFUND – project implementation

Reports & payment requests

The Financial Report consists of the structured individual and consolidated Financial Statements (retrieved from the Grant Management System).

• There is an automatic calculation of the costs in the Financial Statement based on the duration (in person months) in the Mobility Declarations (costs are not editable).

• Thus Mobility Declarations are the basis for IFS (Individual Financial Statement) and need to be updated in case of change (particularly before submission of periodic reports).
MSCA COFUND – calendar

Indicative timeline

10 October 2023: opening of the call for proposals

8 February 2024: deadline to send proposals

June-July 2024: notification of call results to applicants

July-September 2024: grant agreement signature for successful projects

As of October 2024: first EU-funded projects start
COFUND – desafios para Portugal

• A primeira é a dificuldade de ter acesso a fundos complementares. Apesar de não haver uma percentagem mínima, na prática é necessário que pelo menos 30% do financiamento do programa seja com fundos complementares (o que se pode concluir através da análise das percentagens de cofinanciamento de propostas vencedoras). A Comissão Europeia incentiva as sinergias do Horizonte Europa com os Fundos de Coesão, podendo essas sinergias serem uma possível solução.

• A segunda é a falta do HR seal of Excellence, que é uma referência para a UE no que diz respeito às boas práticas de recursos humanos na investigação. Apenas oito instituições portuguesas têm esse selo. Com base na análise dos relatórios de avaliação de candidaturas financiadas, podemos facilmente concluir que esse selo é um fator determinante para o sucesso no MSCA COFUND. O importante não é necessariamente ter o selo, mas ter iniciado o processo para o obter (pode durar cerca de dois anos).
The Human Resources Strategy for Researchers

HR EXCELLENCE IN RESEARCH

The ‘HR Strategy for Researchers’ supports research institutions and funding organisations in the implementation of the Charter & Code in their policies and practices.

The implementation of the Charter & Code principles by research institutions render them more attractive to researchers looking for a new employer or for a host for their research project.

The European Commission recognises with the ‘HR Excellence in Research Award’ the institutions which make progress in aligning their human resources policies to the 40 principles of the Charter & Code, based on a customized action plan/HR strategy.

Download the HRS4R Technical Guidelines for Institutions.pdf
Download the hrs4r_procedure_flow_slide.pptx

https://euraxess.ec.europa.eu/jobs hrs4r
Awarded organisations per country

- United Kingdom: 12.7%
- Spain: 22.7%
- Poland: 14.7%
- Norway: 2.0%
- Austria: 1.4%
- Belgium: 2.1%
- Bulgaria: 0.8%
- Croatia: 2.1%
- Cyprus: 0.7%
- Czech Republic: 8.3%
- Finland: 1.6%
- France: 8.8%
- Germany: 3.7%
- Ireland: 1.6%
- Italy: 2.7%
- Moldova: 1.0%
- Netherlands: 1.7%
- Portugal: 1.1%
- Romania: 1.1%
- Serbia: 0.6%
- Slovakia: 1.0%
- Slovenia: 0.6%
- Sweden: 2.4%
- Türkiye: 0.3%
National Delegates / National Contact Points

ERI & Widening

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Research Infrastructures

ERC & Widening

Thank you!