



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 2023 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



Version	Date	Change	Page
1.0 2021	7.10.2021	<ul style="list-style-type: none"> ▪ Initial version (2021 call) 	-
2.0 2022	6.10.2022	<ul style="list-style-type: none"> ▪ Section 1: Clarification about the eligibility criterion "Gender Equality Plan". ▪ Section 3.1: Clarifications regarding the definitions of low-middle income countries, associated partners linked to beneficiary, etc... ▪ Section 4.2: Better explanation how to encode "Secondments from participants from other countries". The table 2 has been updated to better explain the eligibility. ▪ Additional paragraph at the bottom of section 5: to better guide applicants to fill out the budget table, for Third Countries' participants (high-income & low-middle income). 	-
3.0 2023	5.10.2023	<ul style="list-style-type: none"> ▪ Section 4.2: Information about Complementary funding mechanisms in third countries and territories. ▪ Artificial Intelligence (A.I.). ▪ Removal of instruction on interdisciplinary secondments related to template Part B table 2. 	-

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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](#), [List of Participating Countries in Horizon Europe](#)) 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. 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).

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.) if this does not entail double funding¹.

⚠ IMPORTANT: It is not possible to have the same staff funded at the same time under two or more MSCA grants. Furthermore, seconded staff need to be committed full-time to the MSCA project.

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 to 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 in part A of the application form, referring 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

¹ See notes on synergies between the MSCA, Erasmus+ and the EIT, available on <https://op.europa.eu/en/publication-detail/-/publication/40f1a820-2cc2-11ed-975d-01aa75ed71a1/language-en> and <https://marie-sklodowska-curie-actions.ec.europa.eu/document/synergies-between-the-marie-sklodowska-curie-actions-and-erasmus-in-the-area-of-higher-education>

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](#).

Gender Equality Plan: Having a gender equality plan is an eligibility criterion for public bodies, higher education establishments and research organisations from Member States and Horizon Europe Associated Countries. Be aware that if the proposal is selected, having a Gender Equality Plan will be necessary before the grant agreement signature. Please, refer to the [Horizon Europe guidance on gender equality plans](#).

2. Staff Exchanges in a nutshell

Table 1

Overview	
Minimum number of participating organisations	3 in 3 different countries ²
Minimum number of beneficiaries from EU Member States or Horizon Europe Associated Countries³	2
Max number of participants from Academic sector⁴	No restrictions ⁵
Max number of participants from Non-academic sector⁶	No restrictions ⁵
Number of associated partners	No minimum Mandatory Letter of Commitment
Max number of person months	360
Secondment duration⁷	1 – 12 months
Same sector interdisciplinary secondments⁸	≤ 1/3 of the total pm implemented
Ranking lists⁹	8 (scientific) panels ¹⁰
Budget 2023	78,5 Mio €

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

³ 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).

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

⁵ 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 (regardless of the sector).

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

⁷ 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.

⁸ 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.

⁹ 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.

¹⁰ 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).

Table 2

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

* Beneficiaries not requesting EU funding are not allowed under Horizon Europe rules, except for the European Commission Joint Research Centre (JRC). Organisations from EU Member State or Horizon Europe Associated Country not requesting EU funding can participate as associated partners.

** Only secondments from associated partners located in low to middle-income third countries included in the [List of Participating Countries in Horizon Europe](#) are eligible for funding (see [section 4.2](#) below).

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.
- **Countries¹¹:** 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. Based on previous calls, the average size of the consortia is 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 sector 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

¹¹ 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](#)).

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 [List of Participating Countries in Horizon Europe](#) are automatically 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](#). Associated partners linked to a beneficiary should be added in Part B section 3.2 of the proposal.
4. For the minimum consortium composition, legal entities must be independent from each other and located in different countries. Above this minimum requirement there can be more entities located in the same countries. Secondments between entities located in the same country are NOT allowed.

Secondments from/to branches/departments of beneficiaries/associated partners, which are not separate legal entities, are NOT allowed, regardless of where they are located.

Secondments from branches/departments of a beneficiary/associated partner to other branches/departments of the same beneficiary/partner are NOT allowed, even if they are located in different countries.

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.
6. Associated partner linked to a beneficiary do not need to provide a Letter of Commitment.

3.2 Staff member eligibility

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

List of conditions for staff eligibility

Table 3

Condition	Explanation
1. Be considered staff of the sending organisation	<input checked="" type="checkbox"/> 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). <input checked="" type="checkbox"/> The staff member must be under the direction and instructions of the sending organisation for the duration of the secondment.

	<p>⚠ IMPORTANT: 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.</p>
<p>2. Be actively engaged in or linked to R&I activities at the sending institution</p>	<p><input checked="" type="checkbox"/> For at least one month (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). Note that all secondments must be performed on a full-time basis only.</p>
<p>3. Have the appropriate R&I experience</p>	<p><input checked="" type="checkbox"/> Staff members shall have appropriate competence to implement the project and R&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&I activities of the organisation. Therefore, they are not eligible for secondments.</p>
<p>4. Return to the sending institution</p>	<p><input checked="" type="checkbox"/> After the period of secondment, seconded staff should return to their sending institution, thus maximising the impact of the action for knowledge sharing and long-term collaboration.</p>

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 member must be a minimum of 1 month and a maximum of 12 months (independently of the number of organisations the staff member is seconded to). A secondment may be split into several stays (called a "split stay") with one or several beneficiaries or associated partners if it respects the above-mentioned minimum and maximum duration (1 – 12 months). The duration of the secondment is counted from the day of departure to the day of return.

4.2 Sending and hosting organisations

Secondments must always take place between different countries.

Secondments from beneficiaries from EU Member States /Horizon Europe Associated Countries and from associated partners located in low and middle-income third countries included in the [List of Participating Countries in Horizon Europe](#) on the Funding & Tenders Portal are eligible for funding.

Secondments from participants from "Other Countries" (not in the [List of Participating Countries in Horizon Europe](#)) are in principle not 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. In case of exceptional funding request, two requirements are mandatory in the proposal:

1. Encode the "number of seconded researchers" and "number of person months" in the budget table (Part A, section 3).
2. Add a paragraph justifying the exceptional funding request in proposal Part B1 - section 3.2 (Quality, capacity, and role of each participant, including hosting arrangements and extent to which the consortium as a whole brings together the necessary expertise).

In addition, the applicants may consider at the time of preparing their proposals the existence of [HE Complementary funding mechanisms in third countries](#).

The eligibility rules for EU funding for organisations from the [List of Participating Countries in Horizon Europe](#) are summarised in table below. It is important to highlight that same-sector secondments (e.g., from academic sector to academic sector) between EU Member States/Horizon Europe Associated Countries are allowed for up to one third (1/3) of the total person-months implemented under the project, if they meet the interdisciplinary criteria (see [section 1](#) for definition).

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)	Associated Partners eligible for funding	Associated Partners non-eligible for funding
"SENDING" (sending staff members from organization)	Academic organisation in MS/AC (1)	1/3	✓	✓	✓
	Non-academic organisation in MS/AC (2)	✓	1/3	✓	✓
	Associated Partners* eligible for funding	✓	✓	✗	✗
	Associated Partners non-eligible for funding	✗	✗	✗	✗

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.

* Associated Partners eligible for funding (see List of Participating Countries in Horizon Europe)

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

4.4 Same-sector secondments between MS/AC

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 different Member States/Associated Countries within the same sector (academic or non-academic) if the proposal is considered as interdisciplinary by the evaluators**, this will be assessed under the Excellence criteria.¹²

4.5 Unit contributions

The financial contribution to an MSCA Staff Exchanges project is calculated based on **unit contributions**, as defined 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.

¹² See [section 1](#) for definition.

⚠️ IMPORTANT: the salary of the seconded staff member or any other type of remuneration (*if applicable*) 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.) as well as communication, dissemination and training not related to the R&I activities, will not be supported.

The EU contribution indicated in the Grant Agreement 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 interdisciplinary secondments in Member States/Associated Countries, the 1/3 rule will be calculated based on the total secondments eligible for funding declared.

5. Information 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.

In the Electronic Submission Service, the applicant chooses the scientific 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.

Selected keywords may also be used in the assessment of the interdisciplinary of secondments and may influence the eligibility of same 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 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 several [keywords](#) is available on the REA website.

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

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., Catalysis).
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.

⚠ IMPORTANT: How to complete the Budget table (Part A section 3)

All participant organisations must be encoded only in the budget table as “**Partner**” (regardless of whether they are beneficiaries or associated partners), except the coordinator, which is registered as “**Coordinator**.”

Participants from Member States/Associated Countries and from **low to middle-income countries** (automatically eligible for funding included in the List of Participating Countries in Horizon Europe) must encode the “number of seconded researchers” and “number of person months”.

Participants from **other countries** (not in the List of Participating Countries in Horizon Europe) must encode zero (0) “number of seconded researchers” and zero (0) “number of person months”. For Exceptional funding requests see [section 4.2](#) above.

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

⚠ IMPORTANT: Artificial Intelligence (A.I.)

If your proposal mentions in any way the use or development of Artificial Intelligence (A.I.), it is mandatory to include it in *section 1.* of proposal part B1: *Excellence – 1.2. Soundness of the proposed methodology.*

⚠ IMPORTANT: List of publications: In part A, neither the beneficiaries, nor the associated partners, need to fill in the list of up to five publications, relevant previous projects, or significant infrastructure. This information however will need to be described in the relevant sections of part B2.