



Information note for Marie Skłodowska-Curie Fellows in a Co-funding of regional, national and international programme (COFUND)

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a Co-funding of regional, national and international
programme (COFUND)**

Table of Contents

What is COFUND?	5
COFUND researchers	6
What are my rights as a COFUND research fellow?	7
Allowances.....	8
Secondments	9
Specific Issues	9
After your fellowship	10
Key terms.....	12

Information note for Marie Skłodowska-Curie Fellows in a Co-funding of regional, national and international programmes (COFUND)¹

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This document complements the general *Information package for Marie Skłodowska-Curie fellows*² with information on the conditions of appointment and remuneration specifically for those holding an MSCA fellowship as part of a Co-funding of regional, national and international programmes (COFUND). Quotations in italics are from the model grant agreement for COFUND.

What is COFUND?

COFUND stands for "Co-funding of regional, national and international programmes". The scheme aims to stimulate regional, national or international programmes to foster excellence in researchers' training, mobility and career development, spreading the best practices of Marie Skłodowska-Curie actions.

This will be achieved by co-funding new or existing regional, national, and international programmes to open up to, and provide for, international, intersectoral and interdisciplinary research training, as well as transnational and cross-sectoral mobility of researchers at all stages of their career.

COFUND will support Doctoral Programmes (DP) and Fellowship Programmes (FP) for the most promising early-stage researchers (ESR) and experienced researchers (ER), respectively. The programmes must run a selection process based on openness, transparency, merit, impartiality and equality for the researchers who are applying.

A) Doctoral programmes

Doctoral programmes address the development and broadening of the research competencies of early-stage researchers (ESR). The training follows the EU Principles on Innovative Doctoral Training. Collaboration with a wider set of partner organisations, including from the non-academic sector, which may provide hosting or secondment opportunities or training in research or transferable skills, as well as innovative elements of the proposed programme, will be positively taken into account during the evaluation. Each researcher must be enrolled in a doctoral programme. Attention is paid to the quality of supervision and mentoring arrangements as well as career guidance.

B) Fellowship programmes

Fellowship programmes fund individual research training and career development fellowships for experienced researchers (ER). The programmes supported should have regular selection rounds following fixed deadlines or regular cut-off dates, allowing fair

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² http://ec.europa.eu/assets/eac/msca/documents/documentation/publications/msca-fellows-information-package_en.pdf

competition between the researchers applying. The selections should be based on open, widely advertised competition, with transparent international peer review and the selection of candidates on merit. Mobility types supported by fellowship programmes may be similar to the ones supported under Marie Skłodowska-Curie Individual Fellowships. On top of transnational mobility, applicants are encouraged to include elements of cross-sectoral mobility into their programmes. Fellowship programmes should be based on individual-driven mobility, i.e., researchers should be able to freely choose a research topic and the appropriate organisation to host them, fitting their individual needs.

Based on the 2016-2017 MSCA Work Programme, COFUND will receive around €80mn in funding in 2016 and 2017, respectively. This comprises €50mn for the fellowship programme and €30mn for the doctoral programme and translates into around 30 - 35 separate projects being financed annually.

COFUND researchers

Eligibility

COFUND offers funding for Early Stage Researchers and Experienced Researchers. To be eligible for recruitment within a COFUND project, you therefore must – at the date of recruitment or the deadline of the co-funded programme be:

- in the first four years (full-time equivalent research experience) of your research career and not yet have been awarded a doctoral degree (**Early-Stage Researchers - ESR**) or;
- in possession of a doctoral degree or have at least four years of full-time equivalent research experience (**Experienced Researchers - ER**)

Full-Time Equivalent Research Experience is measured from the date when you have obtained the degree entitling you to embark on a doctorate, either in the country in which the degree was obtained or in the country in which you are being recruited, even if a doctorate was never started or envisaged.

Mobility Rule

The MSCA are a researcher mobility programme. Researchers may not have resided or carried out their main activity (work, studies, etc.) in the country of the beneficiary/partner organisation (or – in case of international European interest organisations – with this organisation) for more than 12 months in the 3 years immediately before the co-funded programme's call deadline or the date of recruitment unless otherwise specified in Annex I for existing programmes.

For Fellowship programmes supporting reintegration in Europe, career restart opportunities, or activities similar to those of the MSCA-IF Society and Enterprise Panel, researchers may not have resided or carried out their main activity (work, studies, etc.) in the country of the beneficiary/partner organisation (or – in case of international European interest organisations – with this organisation) for more than 3 years in the 5 years immediately before the co-funded programme's call deadline or the date of recruitment, unless otherwise specified in Annex I for existing programmes.

Time spent as part of a procedure for obtaining refugee status under the Geneva Convention, compulsory national service and/or short stays such as holidays are not taken into account.

What are my rights as a COFUND research fellow?

Beneficiaries in COFUND projects sign a contract (or "grant agreement") with the REA and therefore legally commit to implement the proposed project in conformity with the provisions of that contract. These rules seek to guarantee a number of rights for researchers recruited in a COFUND. They also impose some obligations, both on the beneficiaries and on the recruited researchers. Each grant agreement consists of a "core grant agreement" that is essentially the same for all projects, and Annexes – Part A and Part B – which are specific to the project in question. Part A contains the administrative details and information that will be used in the evaluation of the COFUND proposal, while part B describes all the specificities of the COFUND project, including the salary amount and any other allowances that you shall receive.

Recruitment

Vacancies in COFUND projects must be advertised and published internationally, including on the EurAxess website. The recruitment procedure must be open, transparent, impartial and equitable with the final decision taken on the basis of the applicants' scientific skills, the relevance of their research experience, the impact of the proposed training on their career, and ensuring a fair gender representation³.

Employment

You should normally be recruited with an employment contract and which includes social security coverage (unless this is not possible under national law). This contract should specify your gross and net salary. A clear explanation of how your net salary is calculated should also be provided by your employer. Note that recruitments in COFUND can be for a minimum duration of 3 months.⁴ However, the specific length of your recruitment will have been agreed beforehand with the REA and must be specified in your employment contract. You should be fully aware of and understand all the provisions of your contract *before* signing it. This may require a translation of the contract into English or your mother tongue.

The project consortium is required to submit electronically a Researcher Declaration within 20 days of your recruitment⁵. The content of this document should correctly reflect the provisions of your employment contract, including duration, contract type, etc.

Assistance

Your host beneficiary is required to assist you in all administrative procedures related to your recruitment within the project⁶, for example in obtaining a visa, preparing your Career Development Plan, etc. They are also required to inform you about your rights and obligations under the grant agreement, including who will be your supervisor, when and for how long your appointment shall last, your salary and conditions, the allowances you are entitled to receive, etc.

³ See Article 15.1.1(c) of the model grant agreement for COFUND.

⁴ See Article 15.1.1(d) of the model grant agreement for COFUND.

⁵ Article 19.1 of the model grant agreement for COFUND.

⁶ See Article 15.1.2 of the model grant agreement for COFUND.

Hosting

Each beneficiary has the obligation to host the recruited "*researchers at their premises or partner organisations and provide training as well as the necessary means for implementing the action*"⁷. Your normal place of employment and where you turn up for work each day should therefore be the premises of the institution that has recruited you and which is paying your living and mobility allowances (see below). Your host institution should provide you with the resources and equipment required to conduct your work. Should it be necessary for you to use the infrastructure or premises of other partner organisations in order to conduct your research, this should be outlined in your contract of employment.

Supervision

In the doctoral programme your host institution shall appoint a supervisor with adequate experience to provide you with academic support and a career plan. Your host institution should also be able to ensure adequate supervision of your research⁸. How "adequate supervision" is understood, however, will depend on your employer, on yourself, and on the particular field of research. It should, however, be adequate for you to satisfactorily complete your research project. Where supervision is provided by someone based at another organisation, this should be clearly specified in the grant agreement.

Allowances

The funds provided to your host beneficiary for the purposes of implementing the project are divided into two categories: those for the benefit of the researcher ("cost for researchers – living allowance"), and those for the benefit of the host institution ("management costs"). Other costs items than the living allowance and the management costs must be funded through other resources.

i) Researcher Unit Cost (Living allowance)

You should request from your employer a clear overview of how your monthly allowance is calculated (both the gross amount and the amount net of all taxes and deductions). Note that the total amount received may vary from beneficiary to beneficiary, even within the same country. This is because beneficiaries can deduct employer as well as employee payroll taxes and social security costs from the gross salary.

Your employer should explain to you your salary and conditions, the allowances you are entitled to receive in accordance to the annex I of the grant agreement (signed between REA and the beneficiary). Besides, this information should also be provided in the publication of the call.

The sum of the monthly living allowance (salaries, social security contributions, taxes and other costs included in the remuneration) and the mobility allowance, offered by the programme to you must in no case be lower than:

- EUR 2.597 per month for Early Stage Researchers and;
- EUR 3.675 per month for Experienced Researchers

⁷ Article 8 of the model grant agreement for COFUND

⁸ Article 15.1.2 of the model grant agreement for COFUND

ii) Institutional Unit Costs (Management Costs)

In addition to the researcher unit cost, there will be an EU contribution for institutions on the basis of unit costs, which amounts to EUR 325/person-month for each eligible researcher. These costs must be used towards the management of the programme. This EU contribution is expected to be shared between the beneficiary and the partner organisation(s).

Secondments

Spending periods of secondment at other beneficiaries and/or partner organisations within the project is actively encouraged insofar as this is useful for your research and/or training. Inter-sectoral secondments (i.e. between the academic and non-academic sectors, or vice-versa) are particularly encouraged.

However, if a secondment to an organisation in any TC constitutes the main part of the research training activities, researchers must be nationals or long-term residents of a MS or AC. Long-term residence means a period of at least 5 consecutive years of full-time research activity in MS or AC.

Specific Issues

For the Doctoral Programme

The programme must concern research training activities for recruited researchers (ESR) that lead to the award of a doctoral degree;

For the Fellowship Programme

The programme must concern fellowships for research training activities for recruited researchers (ER)

For fellowships where the main part of the research training activity does not take place in an EU Member State or associated country, the return phase to an EU Member State or associated country may not be more than 50 % of the total duration of the research training activity.

Ethics and Research Integrity

Beneficiaries must ensure that the project complies with ethical principles, including the highest standards of research integrity⁹, and all applicable international, EU and national law. Any specific ethics requirements will be outlined in the Description of the action (Annex 1 to the grant agreement), including any documentation or certificates to be provided to the REA before the research work in question begins. Should any ethics concerns arise during project implementation that you are not able to satisfactorily address with your supervisor and/or project coordinator, please refer to the complaints procedure below.

⁹ Further described under Article 34 of the annotated grant agreement for Horizon 2020 at http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf, including reference to the European Code of Conduct for Research Integrity

Teaching

Complementary skills training (e.g. a teaching activity as part of the research training) are not incompatible, but must not jeopardise the implementation of the research training activities. Teaching is permitted, insofar as it does not jeopardise the fulfilment of your research activities within the project.

Complaints

Your project should have a complaints procedure in place and it should be clear to whom you should refer to in case of complaints. Please also see the guidance on complaints in the 'career guidance and supervision' section of the general *Information package for Marie Skłodowska-Curie fellows*¹⁰. The REA Project Officer responsible for your project will normally attend the mid-term review meeting and will offer the recruited fellows the opportunity to discuss any concerns that may arise.

Contract Suspensions

In certain, limited cases (e.g. long-term absence, maternity/paternity leave) – and only with the prior agreement of the REA – it is possible for fellows to suspend the implementation of their respective projects. For exceptional personal or family reasons, it might also be possible to work part-time on your research project. In each case, this matter should be discussed beforehand with your supervisor.

Intellectual Property Rights

The participating organisations must give you – and where appropriate their partners in the project – royalty-free access to the background and results necessary for your research work. "Background" means any data, know-how or information that is held by an organisation *before* it signs the grant agreement and which is needed to implement the project or exploit its results. "Results" means any (tangible or intangible) output generated by the project, such as data, knowledge or information.

Confidentiality

You must maintain all necessary confidentiality relating to your research work¹¹.

After your fellowship

We very much hope you enjoy your experience within a COFUND project and that you are fully able to benefit from the research, training and networking opportunities that it offers. The lengths of the individual researchers' appointments must be at least 3 months. However, recruitment should take into account the specificities of the programmes. DP may take into account the national context in which the doctoral training is provided. For instance, it is expected that DP would offer recruitment of ESRs corresponding to the typical time needed to complete a PhD in the corresponding country. For FP, the typical duration of the individual researchers' appointments of ERs varies from 12 to 36 months.

¹⁰ http://ec.europa.eu/assets/eac/msca/documents/documentation/publications/msca-fellows-information-package_en.pdf

¹¹ Article 36 of the model grant agreement for COFUND.

There are, however, other EU funded opportunities that may be of interest to you once you have completed your project:

MSCA Individual Fellowships (IF)

These are individual research fellowships awarded to the best or most promising researchers of any nationality looking to enhance their career development and prospects by working abroad. Two types of fellowship are funded: European Fellowships, whereby researchers must either move to or within Europe (MS or AC), and Global Fellowships in which the fellow is seconded to a third country for a maximum of two years and then must return to a European host institution for a mandatory 12 month period. To be eligible, fellows must be Experienced Researchers with either a doctoral degree or at least four years full-time research experience. Funding is available for a period of between 12-24 months for European Fellowships and 24-36 months for Global Fellowships. More information is available in the MSCA Work Programme and the respective IF Guides for Applicants.

European Voluntary Service (EVS)

Funded under the Erasmus+ Programme, the EVS helps young people aged 17-30 travel abroad to participate in volunteering projects for a period of between two weeks and 12 months. Projects can involve many different kinds of activities in areas such as youth work, cultural activities, social care or environmental protection and take place both within and outside of Europe. Although the voluntary work is unpaid, essential costs such as accommodation, board and local transport are covered.

Key terms

Beneficiary/Employer: every participating organisation that signs the grant agreement with the REA is considered to be a "beneficiary". Each beneficiary receives funding directly from the project budget and will recruit and host researchers in the context of the project.

Partner Organisations: these are institutions associated to your project in order to offer training and secondment opportunities, but without being full beneficiaries. They will therefore not recruit any researchers themselves, but will instead offer their expertise and, in some cases, specific infrastructure. The names of all Partner Organisations in your project, as well as the extent and nature of their involvement, will be indicated in the grant agreement.

Unit Cost: this refers to the fixed amounts that are paid for the implementation of the project. These costs are based on units, one unit being one implemented person-month.

