Key Recommendations by the Marie Curie Alumni Association (MCAA) on the Marie Skłodowska-Curie Actions (MSCA) Programme

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MARIE CURIE ALUMNI ASSOCIATION

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Table of Contents

About the Marie Curie Alumni Association5
List of Contributors (in alphabetical order)5
Background6
Key recommendations by the Marie Curie Alumni Association (MCAA) on the MSCA Programme6
1. Implementation of ISE's Early Research Career Manifesto in the MSCA work programme8
2. Removing the "research age" limit9
3. Improving the working conditions of the MSCA fellows 10
3.1 Reversing the "postdoc" terminology in the MSCA Fellowship 10
3.2 Terminological change related to MSCA "Principal Investigator" 12
3.3 Supporting the family and career balance 13
3.4 Alleviating mobility challenges and regional discrepancies 14
3.5 Implementation of a system for monitoring unethical behaviours
4. Suggested adaptations and improvements of the MSCA work programme and current budget units
4.1 Move the elaboration of a secondment plan from proposal stage to a later project stage
4.2 Increase institutional B1 (research, training and networking) unit in Doctoral Networks to 2000 EUR
4.3 Separation of management and indirect costs (B2) unit 18
4.4 Increase fellowships in Industrial Doctoral Networks (IDN) to 48 months as new incentive

4.5 "Qualification guidelines" for supervisors to initiatives on Research Assessment	
4.6 Facilitate participation of EU-13 countries in 0	CO-FUND projects
4.7 Facilitate secondments in CO-FUND projects	
5. Continuation and Expansion of the MSCA4Ukraine	
References	22
Acknowledgments	23
Disclaimer	23

About the Marie Curie Alumni Association

The Marie Curie Alumni Association (MCAA) is a global network with 20,000+ members from over 150 countries, open to any past or present beneficiaries of the Marie Skłodowska-Curie Actions (MSCA), not restricted to researchers, but including their supervisors and MSCA project managers. The MCAA aims to connect the MSCA community, supporting career development initiatives for MCAA members and advocating for research and researchers.

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Background

The 2023 Marie Curie Alumni Association (MCAA) Annual Conference, which took place on 24-25 February in Cordoba (Spain), brought together researchers, policymakers, and stakeholders from around the world to discuss some of the major challenges in science diplomacy and sustainable development. Research assessment, the stability of early career researchers, and research management were among the topics covered and debated during the conference. This event also allowed for discussions with Marie Skłodowska–Curie Actions (MSCA) beneficiaries on the current status and mechanisms of the MSCA programme. Building on the sessions and key points made during the MCAA conference, this policy brief sets out MCAA's recommendations relevant to the evaluation of the first results of Horizon Europe's Research & Innovation Actions funded by the EU in 2021-2023.

Key recommendations by the Marie Curie Alumni Association (MCAA) on the MSCA Programme

The MCAA welcomes the new elements included in Horizon Europe such as the five main mission areas, the Open Science policy, the support for innovation in the European Innovation Council, and the new approach to partnership. The MCAA commits to provide further recommendations on the "Public consultation on the EU's Horizon Research and Innovation Programmes 2014-2027" for Horizon Europe, especially with a focus on the MSCA programme.

The MCAA puts forward the following recommendations:

1. Implementation of ISE's Early Research Career Manifesto in the MSCA work programme

- 2. Removing the "research age" limit
- 3. Improving the working conditions of the MSCA fellows
 - 3.1. Reversing the "postdoc" terminology in the MSCA Fellowship
 - 3.2. Terminological change related to MSCA "Principal Investigator"
 - 3.3. Supporting the family and career balance
 - 3.4. Alleviating mobility challenges and regional discrepancies
 - 3.5. Implementation of a system for monitoring unethical behaviours
- 4. Suggested adaptations and improvements of the MSCA work programme and current budget units
 - 4.1. Move the elaboration of a secondment plan from proposal stage to a later project stage
 - 4.2. Increase institutional B1 (research, training and networking) unit in Doctoral Networks to 2000 EUR
 - 4.3. Separation of management and indirect costs (B2) unit
 - 4.4. Increase fellowships in Industrial Doctoral Networks (IDN) to 48 months as new incentive
 - 4.5. "Qualification guidelines" for supervisors to meet the recent initiatives on Research Assessment
 - 4.6. Facilitate participation of EU-13 countries in CO-FUND projects
 - 4.7. Facilitate secondments in CO-FUND projects
- 5. Continuation and Expansion of the MSCA4Ukraine programme

1. Implementation of ISE's Early Research Career Manifesto in the MSCA work programme

The MCAA endorses the <u>Early Research Career Manifesto</u> by the Initiative for Science in Europe (ISE), and calls the European Commission to:

Monitor the research landscape by starting with a focus on reporting on the effects of the COVID-19 pandemic, as well as other crises (e.g. wars and earthquakes) on the attractiveness of PhD programmes, the effects on the doctoral training, and the consequences on the career development of early-career researchers.

- Facilitate the recruitment of early career researchers in academia, industry, public administration, and NGOs by encouraging a new research assessment scheme, alleviating the impact of the pandemic and other crises, and fostering joint recruitment schemes.
- Establish the creation of a common pan-European research job market framework to ease the mobility and the collaboration in Europe by initiating and strengthening collaborative work between stakeholders, including ministries, national agencies, researchers associations and Research Performing Organisations (RPOs).

The MCAA encourages the MSCA to monitor the effects of the COVID-19 pandemic on both the research career of the fellows and their research results, measuring the brain drain (geographical and intersectoral), the effect on the so-called "great resignation" in academia, and the wellbeing of the grantees. The data collected can then be used for evidence-based policy for the facilitation of the recruitment and retention of early-career researchers as well as for developing specific recommendations of a common 'pan European research job market.'

Furthermore, the MCAA calls for a direct involvement of the MSCA Unit in the implementation of the Early Research Career Manifesto.

2. Removing the "research age" limit

The MCAA acknowledges the efforts of the European Commission in promoting researchers' mobility across all disciplines and sectors. The MCAA also recognises the strength of the previous framework programme, namely Horizon 2020, which had no restriction based on "research age" for applying to MSCA Postdoctoral Fellowships. In Horizon Europe, a "research age" limitation has been introduced, that is, only candidates with 8 years or less of experience from their PhD award date are eligible to apply. While this is an attempt by the European Commission to address the current challenges of limited funding opportunities for early and mid-career researchers, this new requirement is rather controversial as it does not take into account several factors, including:

- The development of the "triple i" (international, inter-sectoral, and interdisciplinary research) skill set, one of the most valuable trademarks of the MSCA programme. Such a development takes a rather long time. Moreover, a good portion of early career researchers are not readily aware of the career possibilities in interdisciplinary fields and other sectors; which means that it takes them more time to apply to MSCA grants, independently of their talents.
- Work-life balance, including caring responsibilities, often broader and not covered by the single approach of being or becoming a parent (e.g. caring responsibilities of other family members), and for accommodating new family-career balance dynamics associated with mobilities.

- The heterogeneity in doctoral training in different regions, as several countries have different career structures in academia. A case in point, though not limited to, are developing countries and the Western Balkan region, where the "research age" limit introduced in Horizon Europe has a negative and discriminatory impact on researchers from those regions.
- The MSCA once-unique perspective of life-long career training and evolution. Supporting the "triple i" mobility regardless of the career stage was one of the most appealing and unique features of the MSCA programme, a feature which has been eliminated by the imposed research age limit. The dynamic interchange between academia and industry throughout researchers' careers, that the MSCA so successfully promoted before the introduction of the research age limit, is now more important than ever.

Therefore, the MCAA calls on removing the "research age" limit as a requirement in the application and evaluation of the MSCA Postdoctoral Fellowships.

3. Improving the working conditions of the MSCA fellows

3.1 Reversing the "postdoc" terminology in the MSCA Fellowship

The MSCA Individual Fellowship from Horizon 2020 has been renamed in Horizon Europe as "MSCA Postdoctoral Fellowship". The MCAA strongly advocates for the reduction of researchers' career precarity. The latest report published by the OECD on "Reducing the precarity of academic research careers" reports that the terms "postdoc" and

"postdoctoral researcher" identify a de facto "research precariat" consisting of those "holding fixed-term positions without permanent or continuous employment prospects" (OECD 2021, p. 8). The MSCA Postdoctoral Fellowship is currently awarded to researchers capable of demonstrating that they can use the Fellowship to reach research independence and boost their career towards a tenure-track position as well as to facilitate their host institutions to support the researchers with attractive working conditions. However, some MSCA fellows are reporting a lack of commitment by supervisors and their host institutions in facilitating and promoting their career plans. Therefore, we call the MSCA and the EC to:

- Reverse the terminology from "Postdoctoral Fellowship" to "Individual Fellowship" with the aim of reducing the research precarity and promoting a professional career and the tenure track of brilliant and talented researchers.
- Incentivise those host institutions that demonstrate a clear commitment towards the promotion of the MSCA grantees, for instance by placing the MSCA grantees within a tenure-track or permanent position plan in the host institution or that support such possibilities through a clear plan which involves networking and consultation aimed at offering the MSCA grantees the possibility to pursue a more satisfactory career. Such practices are absolutely required to justify the short term funding provided by MSCA grants.
- Monitor and take actions in facilitation of the MSCA fellows career by reducing the funds to those host institutions that are not able either to retain talents after receiving funding by MSCA or which fellows continue on a precarious track elsewhere. Statistics on the employment prospects of their fellows should be requested to host institutions and supervisors both on the application and reporting phases and weight on their evaluation as hosts.

- Add regular mandatory updates on the Personal Careers
 Development (PCD) plan as deliverables at Month 13 and at the
 end of the MSCA. The PCD is a core element of MSCAs aimed at
 equipping fellows with additional technical and transferable skills
 in order to allow them to enhance their international and
 intersectoral experience and needs. The PCD plan should be
 assessed in a dedicated mandatory section in periodic reports in
 all the MSCA proposals
- Promote a new Research Assessment framework in the "quality of supervisors" by providing guidelines for the quality of the supervision criteria and a narrative curriculum enhancing the career progression of the supervisee instead of the pure bibliographic metrics (h-index and impact factors publications). Statistics on the career evolution of past supervised staff should be mandatory.

In a nutshell, the MCAA calls for monitoring actions linked to 1) the career development of the MSCA fellows and 2) the assessment of their supervisors and host institutions.

3.2 Terminological change related to MSCA "Principal Investigator"

Within the Horizon Europe MSCA Postdoctoral Fellowship (and previously in the Horizon 2020 MSCA Individual Fellowship), the role and title of "principal investigator" of the MSCA project is given to the MSCA supervisor, not to the MSCA fellow. This contrasts with one of the core aims of the MSCA Postdoctoral Fellowship programme, that is, to foster the fellow towards a position of research independence and maturity. Indeed, the MSCA postdoctoral fellow usually does act as the de facto principal investigator, although this is not recognised formally.

Moreover, assigning the title of principal investigator to the supervisor risks encouraging unethical behaviours; for instance, a misuse of the project's budget by the supervisor or the host institution.

Therefore, the MCAA calls for a conceptual and terminological change in the MSCA Postdoctoral Fellowship programme, where the MSCA postdoctoral fellow should be referred to and considered as the "principal investigator" of the MSCA project and the supervisor taking a role of mentor and sponsor. A contract between the MSCA fellow and the supervisor should be mandatory and expectations on both sides should be clearly stated while including a set of fixed points regarding autonomy and independence applicable in all cases.

3.3 Supporting the family and career balance

Many researchers struggle to start a family. This is often exacerbated by mobility. MSCA fellows must navigate additional hurdles, e.g., national legislation, unfavourable (sometimes abusive) rules in host institutions, and discrepancies between host (and secondment) countries. Providing a family-friendly environment and work conditions has several advantages, such as attracting diverse talents and hence maximising the recruitment pool for researchers, and improving mental health in academia.

Therefore, the MCAA makes a set of recommendations to ensure a better balance between family/life and career for researchers in Europe:

• Introducing a tailored family allowance and mobility allowances based on individual needs (e.g., caring responsibilities, single parents).

- Supporting visas for the fellows and their family to prevent family separation and disruption.
- Introducing the possibility to claim expenses for family members, e.g., when in secondment/research visit, and for any communication or networking activity away from their host institution, especially for parents of young children.
- Ensuring and promoting dual career support at host countries/institutions.
- Introducing the possibility of a leave period in order to support family planning and care, including adoption, fertility treatments, assisted conception, premature birth, and parental bereavement
- Introducing minimum requirements for paternity leave and shared parental leave among hosting countries
- Ensuring that LGBTIQ+ fundamental rights are respected in all participating countries and by all host institutions.
- Encouraging host institutions to support childcare to become competitive and attractive for researchers as family-friendly institutions, for instance by providing childcare options on campus and reducing childcare costs on researchers

Therefore, the MCAA calls for the introduction of a new and well-defined family and career balance framework in the MSCA programme.

3.4 Alleviating mobility challenges and regional discrepancies

Geographical mobility is a requirement in MSCA grants, promoting the training of the early-career researchers across Europe facing the

different working environments and promoting the collaboration across Europe, also through secondments. However, this requirement does not consider some of the administrative burdens that the MSCA grantees face due to this hypermobility. Hence, the MCAA suggests the following measures aimed at facilitating ease of mobility:

- Promoting the recognition and the homologation of educational titles (Bachelor, Masters, and PhD) at the level of the Member States by involving the Ministries and Higher Education stakeholders in order to simplify the education homologation and cancel the translational fee in the original language, by accepting the diploma in any EU language. We also urge the use and implementation of the European Diploma Supplement for this purpose.
- Promoting a sustainable pension scheme across Europe. The MCAA commends the European Commission for creating the RESAVER pension fund and encourages the European Commission to inform the host institution and grant beneficiaries about the framework and solutions of this pension scheme, facilitating the meeting of stakeholders to create a better pension policy framework across countries.

Therefore, the MCAA calls for an urgent revaluation of educational titles and pension schemes at the European level.

3.5 Implementation of a system for monitoring unethical behaviours

Over the past years, the MCAA has been increasingly receiving private communications from MSCA doctoral and postdoctoral fellows who have

been alerting about improper and unethical behaviours they have been facing, carried out by members of their host institution, oftentimes by their MSCA supervisor. Such behaviours span from unethical research practices – like appropriation of the fellows' work or their exclusion from publications related to the MSCA project - to discrimination based on various factors - like gender and ethnicity - to sexual harassment. Said MSCA fellows report a difficulty in alerting the European Commission about said behaviours, given that the main way to reach out to the Project Officer is the Participant Portal, which does not allow for a direct communication between the fellow and the Project Officer. Indeed, communication through this channel is visible to several members of the host institution, in some cases to the very perpetrator of unethical behaviour. The MCAA acknowledges that, at least in the current state of things, these issues can mostly (or either only) be addressed within the host institution and that, given the current lack of a common legal framework at the European level, they fall within national legislation. However, the MCAA believes that several actions could be taken by the European Commission in order to discourage and address unethical behaviours within the MSCA programme, behaviours which have a substantial negative impact on the career and wellbeing of MSCA fellows. One possible action is the deployment of a system which would allow MSCA doctoral and postdoctoral fellows to safely report unethical behaviour. Said system could be managed by a third party body like the MCAA, and the data could allow the European Commission to flag those supervisors who face repetitive complaints of unethical behaviour by various fellows and those host institutions that fail to address complaints accordingly.

Therefore, the MCAA calls for the deployment of a reporting and monitoring system for unethical behaviour within the MSCA programme.

4. Suggested adaptations and improvements of the MSCA work programme and current budget units

The MCAA makes the following set of recommendations for a **better** facilitation of secondments, Personal Career Development (PCD) plans, the work programme, and current budget units.

4.1 Move the elaboration of a secondment plan from proposal stage to a later project stage

Secondments are one of the core elements of MSCAs, they are crucial to equip fellows with additional technical and transferable skills, and enhance their international and intersectoral experience. Currently, in MSCA Doctoral Networks (DN), a secondment plan has to be provided and is then evaluated at the proposal stage, when the skill sets can only be vaguely estimated based on the desired profile of a Doctoral Candidate (DC). Therefore, currently, many changes to this initial secondment plan happen during the life of a DN project, each of them having to be approved by the Project Officer, which in turn requires a lot of formal communication.

Ideally, the secondment plan should be elaborated only once all fellows are recruited and their expertise, skills and interests are known, e.g. as part of the mandatory PCD plan that is due in Month 13.

4.2 Increase institutional B1 (research, training and networking) unit in Doctoral Networks to 2000 EUR.

The institutional B1 unit does not only cover research costs, but also travel and accommodation costs that occur during the project, such as secondments and attending conferences. In the transition from Horizon 2020 to Horizon Europe, the B1 unit was decreased from 1800 to 1600 EUR per person per month (PM). In a reality that faces a dramatic inflation - especially for fuels, long distance travel, and accommodation costs - host institutions struggle to implement international visits as described in the proposal (and required by the MSCA call). Oftentimes, secondments are either cancelled or their length significantly cut down, and conference attendance is largely restricted.

To avoid such scenarios and ensure international mobility, the MCAA suggests increasing the B1 unit to 2000 EUR per PM and to foresee regular revisions as external circumstances continue to change.

4.3 Separation of management and indirect costs (B2) unit

The budget for a central project management and a project manager position plays a crucial role in MSCA projects that involve larger consortia (Doctoral Networks, CO-FUND, Staff Exchange). As recommended in the LERU DESCA model consortium agreement for ITNs (LERU, 2014), it is common practice to redistribute the B2 unit and reallocate a certain percentage (e.g., 50%) of it to the coordinator for central project management. However, the budget in the B2 unit is also expected to cover indirect costs ("overheads") of each consortium member, which has been raising internal disputes among consortium members over the unit, such as its internal distribution for project's

management costs and overheads. Even though the B2 unit gives, at the moment, a large flexibility on its usage, the MCAA suggests:

- Splitting the indirect costs budget from the management budget to avoid internal conflicts among the consortium members as well as competition between both costs,
- Implementing in the MSCA programme standard overheads of 25% per beneficiary,
- Maintaining a B2 unit of at least 800 EUR per person month for an efficient management of each project.

4.4 Increase fellowships in Industrial Doctoral Networks (IDN) to 48 months as new incentive

The collaboration between the academic and the non-academic sectors is a crucial element in the career development of fellows. Industrial Doctoral Networks (IDN) offer a suitable scheme to strengthen the collaboration between academia and industry. However, in its current form, the 2023/24 MSCA work programme (WP) offers no incentive to apply for an IDN, especially considering that fellows have to spend half of their time in the non-academic sector, which is seen by many academic supervisors and universities, where fellows are obliged to be enrolled, as an additional obstacle or even as "wasting time". In the Horizon Europe 2021/2022 MSCA Work Package, the number of person months in the standard DN was decreased to 360 PMs, to incentivise the IDN and Joint Doctoral Networks (JDN), which were kept at 540 PMs. A few important changes were also implemented to facilitate the implementation of IDNs (e.g. no secondment restriction in IDN -> hosting non-academic partners can be only associated). In the 2023/24 WP the standard DN went back to 540 PM. In parallel, the JDN offers fellowships

of up to 48 months. This leads to the fact that there is no incentive anymore to apply for an IDN.

Therefore, the MCAA suggests extending the possibility for 48 months fellowships to IDN.

4.5 "Qualification guidelines" for supervisors to meet the recent initiatives on Research Assessment

In the DN proposal template, Section 1.4 ("Quality of the supervision") requires the sub-heading "Qualifications and supervision experience of supervisors." While the template provides as a reference the MSCA supervision guidelines, it stays vague about expected qualifications, and often supervisors refer here to their h-index, number of publications, etc. A similar situation can be found in the template for MSCA Postdoctoral Fellowships. In line with the several ongoing initiatives towards an alternative researcher assessment, some clearer guidelines on the qualification of supervisors would be helpful. This could also raise awareness for more junior supervisors to focus on metrics other than publication record and number of supervised students (bachelors, masters or PhD levels).

Therefore, the MCAA calls for clearer guidelines on the qualification of supervisors within MSCA Doctoral Networks and Postdoctoral Fellowships.

4.6 Facilitate participation of EU-13 countries in CO-FUND projects

In its current form, the newly established CO-FUND programme heavily disadvantages EU-13 countries that are not able to provide sufficient cofunding for competitive salaries and research conditions.

The MCAA suggests increasing the EU-contribution for EU-13 countries in EU-13 countries.

4.7 Facilitate secondments in CO-FUND projects

Currently, in the CO-FUND programme, secondments do not have a dedicated unit. This increases the risk that secondments remain at a mere plan level and are not realised due to a lack of budget and explicit commitment.

The MCAA suggests the inclusion of a dedicated unit to ensure that secondments in CO-FUND projects happen.

5. Continuation and Expansion of the MSCA4Ukraine programme

The war in Ukraine has sadly shed once more light on the negative impact of conflicts on all levels of society, including research and researchers. Since the beginning of the Ukraine conflict, the MCAA took several initiatives, such as issuing a statement, opening a support group for the members from Ukraine and launching a fundraising campaign. The MCAA congratulates the European Commission and the MSCA Unit

for the MSCA4Ukraine initiative, a programme which has proved to be highly successful and timely.

Therefore, the MCAA calls for continuing the MSCA4Ukraine programme as long as needed, at least until the situation in Ukraine is resolved. Moreover, in line with the attention placed by the MSCA on Researchers at Risk (see for instance MSCA Researchers at Risk 2021 and the Guidelines for Inclusion of Researchers at Risk), the MCAA also suggests expanding the programme so as to support researchers at risk from other conflicts.

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