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OPEN LETTER

Ten lessons for future MSCA/COFUND applicants

[version 1; peer review: 1 approved with reservations, 1 not approved]

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Abstract

The Marie Skłodowska-Curie Actions (MSCA) support researchers' training and development and prioritise international mobility and interdisciplinary collaboration. As the European Commission's flagship doctorate and post-doctorate fellowship programme, it is fiercely competitive. This perspective piece aims to support future applicants of the programme by presenting ten lessons learned derived from three MSCA/COFUND projects: DTA3 doctoral programme in the UK, Train@Ed post-doctoral programme at the University of Edinburgh, and iMED at the University of Copenhagen, Denmark. The lessons cover recruitment strategies, enhanced training and career development programmes, and effective project management. Key recommendations include initiating early recruitment, supporting international mobility, embedding EDI within processes, promoting social cohesion, aligning stakeholders' expectations, developing standardised procedures, appropriately managing time and finances, and maintaining realistic project plans. These insights aim to assist future MSCA/COFUND applicants in improving project impact and sustainability.

Keywords

MSCA, project management, European Commission, funding, doctoral

Open Peer Review

Approval Status ? ✗

	1	2
version 1 25 Oct 2024	? view	✗ view

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2. **Mario Coccia**, CNR-National Research Council of Italy, IRCRES-CNR, Turin Research Area of the CNR, Arizona State University, Turin, Italy

Any reports and responses or comments on the article can be found at the end of the article.

This article is included in the Marie-Sklodowska-Curie Actions (MSCA) gateway.

This article is included in the Horizon 2020 gateway.

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Introduction

The Marie Skłodowska-Curie Actions (MSCA), part of the European research and innovation programmes, advance research by supporting researchers at all career stages and fostering mobility across borders, sectors, and disciplines (European Commission, 2024). With a €6.6 billion budget from 2021 to 2027, MSCA promotes research excellence, supports collaborative projects, and sets standards for researcher development aligned with European principles. The programme emphasises mobility, inclusive recruitment, effective supervision, interdisciplinary research, international and intersectoral exposure, and responsible research conduct. These actions enhance researchers' skills and knowledge and positively impact participating organisations and society, building Europe's research and innovation capacity.

The MSCA/COFUND action fund doctoral and postdoctoral training programmes through co-funded mechanisms. Eligible applicants include government entities, regional authorities, funding agencies, universities, research organisations or enterprises in an EU Member State or Horizon Europe Associated Country. Additional partners can join the project, with a maximum funding of €10 million per call. MSCA/COFUND projects promote transparent and merit-based selection and excellence in research training aligned with the European Charter for Researchers and the European Principles for Innovative Doctoral Training. These programmes aim to develop researchers for careers in academia and beyond by supporting transferable skill development, professional network growth, and interdisciplinary research opportunities.

Inspired by Baumert *et al.* (2022), this manuscript provides ten lessons from programme alum, project managers, and grant holders from three MSCA/COFUND projects: a PhD (DTA3) and a post-doctoral programme (Train@Ed) in the UK, and a PhD programme in Denmark (iMED). Our objective is to help future applicants and projects in their planning, overcome challenges more quickly, and enhance impact and sustainability by learning from our experience.

Overview of programmes

DTA3. Seventy-one fellows enrolled in the Doctoral Training Alliance 3 (DTA3) between 2019–2020 across fifteen professional and technical UK universities. Fellows were connected by an enhanced cohort-based doctoral training programme, specialising in the areas of applied bioscience for health, energy, and social policy. DTA3 provided training in entrepreneurship, communication, and employability, and supported collaboration with commercial and non-academic organisations.

Train@Ed. This post-doctoral programme at University of Edinburgh recruited nineteen early-career researchers in 2018, offering secure employment for up to three years with mobility and family allowances where eligible. The programme provided bespoke training, equipping fellows with the knowledge, kills, and experience for careers in academia and industry.

iMED. The International Doctoral Programme in Molecular Mechanisms of Disease (iMED) began in 2017, enrolling twenty-three fellows at the University of Copenhagen's Biotech Research and Innovation Centre (BRIC). It centred on biomedical research areas such as cancer, stem cells, and brain development. The programme offered personalised research and training, including science communication, entrepreneurship, peer-mentoring and career mentoring programmes. iMED aimed to exploit the full potential of doctoral researchers' talents in careers in or outside academia.

The lessons below stem from surveys and discussions with programme alum and the grant management teams of the DTA3, Train@Ed, and iMED. Following reflection and discussion within the programme teams, and as an authorship group, common lessons were identified in three overarching areas (i) recruitment, (ii) training, career activities and wellbeing, and (iii) project management.

Recruitment

Lesson 1: Project success hinges on effective recruitment

Cohort-based recruitment of fellows in MSCA/COFUND projects allow for refinement of recruitment strategies following each subsequent call. Initiating the recruitment process as early as possible enables projects to start as close to the planned start date as possible. To support this, recruitment advertisements should be disseminated widely and actively (i.e., sharing the advertisement across our networks, as well as on traditional recruitment websites) well before the application deadline. Train@Ed, for example, provided applicants with an opportunity to ask questions and meet faculty members by hosting a virtual open day for individuals who were interested in applying to the programme, which led to improved recruitment rates and a positive interview experience for fellows.

International mobility requirements in MSCA programmes often pose a challenge to the recruitment process, for example visa issues can cause significant delays. Therefore, it is important to support fellows not holding UK/EU citizenship with their visa applications and account for right-to work checks and visa acquisition delays into the recruitment timeline. Positive recruitment practices from the COVID-19 pandemic, such as online interviews, have proven easier to organise and more environmentally sustainable than in-person interviews and have therefore been sustained in the post-pandemic.

Lesson 2: Support EDI with clear recruitment evaluation criteria

To ensure fair recruitment and support Equality, Diversity, and Inclusion (EDI), uniform approaches should be implemented in MSCA/COFUND programmes. Evaluator committees received materials and clear guidelines with evaluation criteria before interviews BRIC, using iMED recruitment experiences, now employs clearly communicated criteria and predefined scoring for candidate recruitment.

Gender balance in our programmes was achieved organically (e.g., 56% of DTA3 researchers identified as women). However, an awareness of cultural differences was crucial for equitable recruitment and having a diverse evaluator panel was important to

address cultural sensitivities. DTA3, Train@Ed and iMED are embedding EDI lessons learned from MSCA/COFUND projects into their institutions' recruitment practices. For example, institutions are now providing candidates with interview questions in advance and communicating EDI feedback to funders so that reporting indicators and quotas can be adapted accordingly.

Fellow training, career activities, and wellbeing

Lesson 3: Benefits of enhanced training and career development

Fellows in all three programmes joined new research groups and worked with experts in various disciplines and locations, with some completing secondments. These experiences expanded their professional networks and collaboration opportunities. Within DTA3 and Train@Ed, the intersectoral and international mobility elements were highlighted by fellows as key to securing post-fellowship employment.

The enhanced training and career focus of the programmes supported the fellows' professional development and transferable skills, increasing their employability. DTA3 fellows attended annual residential writing retreats for thesis and manuscript writing, supported by peers. Train@Ed offered career coaching, including CV review and mock interviews, which fellows found particularly helpful for securing post-fellowship employment. iMED provided final year career mentoring, matching fellows with mentors in their fields of interest. This initiative was one of the most valuable (non-research related) activities for career development.

Lesson 4: Cohort-based programmes enhance social cohesion

Although doctorate and post-doctorate training can be taxing, with high stress (Hazell *et al.*, 2021; van der Weijden & Teelken, 2023) and social isolation (Hazell *et al.*, 2020), many fellows valued being part of a cohort-based programme which fostered a sense of community. Transnational relocation requirement of MSCA, and the dispersion of fellows across different research groups, departments, and universities made this particularly important. One DTA3 fellow spoke of the programme giving them a "profound sense of belonging", with many others listing social interactions as being vital to maintaining positive mental wellbeing. Annual in-person contact points, like summer schools, allowed researchers to build a community over the 3-year programme. iMED organised a peer mentorship initiative, whereby new fellows joined a group of trusted peers, supporting each other throughout the trials and tribulations of doctoral study. This was noted as being essential for their well-being and personal development.

Project management

Lesson 5: Make fellows and supervisors aware of MSCA responsibilities

Excellent supervision was a goal in all three projects. Yet, some supervisors lacked awareness of MSCA requirements and had not received relevant training (e.g., knowledge of MSCA ethical requirements, support needed by fellows from supervisors on the development and maintenance of data management plans, open access expectations etc). Accordingly, clear communication with supervisors about their responsibilities is essential. Some Train@Ed fellows needed more research independence and autonomy. In line with MSCA/COFUND guidance, post-doctorate fellows should be involved in research project development and setting professional development priorities. Therefore, aligning fellows and supervisors' expectations from the beginning of the project, supported by EC guidance, is recommended. Organising a project kick-off meeting can help project partners meet and for the MSCA/COFUND scheme, and its associated expectations and rules to be outlined.

Lesson 6: Early alignment of stakeholders is essential

Effective communication is vital for successful project management, especially in complex projects with multiple stakeholders. Early engagement with project partners establishes strong working relationships before the project start date, and ensures all partners understand and can implement MSCA project requirements. Identifying key people within the project group is essential for smooth project implementation. For example, it can be helpful to identify at least one contact point in graduate schools, human resource departments, research office, and financial services who understands the project and its reporting requirements. If any changes are made to project processes or procedures, it is important that they are clearly communicated to all stakeholders so that they can be uniformly adopted. Train@Ed found a good relationship with the university contracts team important for supporting contractual aspects of the project and finalising necessary agreements.

Lesson 7: Develop Standardised Operating Procedures

The complexity of large projects and the inevitable turnover in project personnel during a five-year project highlights the need for consensus-building and clear guidance documentation. Standardised Operating Procedures and directories of key contacts should be developed to support quick project familiarisation for new staff. Maintaining up-to-date contact details of project partners, particularly those who were involved in the bid development and project set-up, is crucial. Additionally, storing fellows' contact information, in line with GDPR guidelines, for an agreed duration after project closure allows for follow-up queries and alum activities (e.g., DTA3 alum are invited to training and networking events and can be nominated for the annual Alum Award). Setting up a project management system, including a project email address to centralise communication and an accessible online space for project documents (e.g., Microsoft SharePoint, or Google Drive) is recommended.

Lesson 8. Don't underestimate the time required for project set-up

Effective time management is paramount in developing, initiating, and implementing MSCA/COFUND projects, particularly due to their comprehensive recruitment process. Despite the seemingly ample duration of the recruitment call window, this timeframe can swiftly elapse amidst the intricacies of partner management and project preparation. Accurately gauging the amount of work needed during the project set-up phase is essential, as an underestimation can lead to critical time deficiencies, oftentimes leading to initial missteps. Therefore, sufficient

time should be built into the project's initiation to reaffirm partner commitments, sign the grant agreement, establish operational frameworks, and recruit staff. Recruiting the first cohort of fellows before the official project start date (allowed) is strongly recommended to allow the project to start at the same time the first cohort of fellows begin their contract. This is especially needed in three-year fellowship programmes with 2–3 recruitment calls to ensure sufficient time for project implementation.

Lesson 9: Financial management – set standards from the beginning

Metifinancial record-keeping aligned with EC requirements is essential. DTA3 experienced challenges in reconciling diverse financial management practices across its fifteen university, particularly when addressing issues such as fellow underpayments. Train@Ed experienced similar challenges with different university departments having their own methods of applying finance codes and distributing family allowances. Following an EC audit, DTA3 restructured payroll information collection to streamline periodic reporting. Given the variety of MSCA/COFUND projects, new projects should seek support from Project Officers or National Contact Points and use the MSCA Project Management Working Group for guidance and peer support.

Lesson 10: Be realistic in your plans and transparent in your reporting

While MSCA/COFUND programmes are extremely competitive (Pina *et al.*, 2021), maintaining realistic expectations regarding project deliverables and avoiding 'window-dressing' in the application is important. The EC rigorously holds applicants to their commitments, and although some deviations can be permissible, there can be a lack of clear guidance on the number and/or extent of permissible deviations. First-time MSCA/COFUND grant holders may encounter unforeseen challenges, affecting project milestones and deliverables, including low recruitment rates, visa entry route changes, or global events such as COVID-19. Hence, meticulous attention to detail in both the grant agreement and subsequent periodic reporting is essential. Dependent on the degree of change, these can be implemented in the grant either through a 'formal notification' or a more comprehensive amendment to the grant agreement, as agreed with the Project Officer. Thus, regular updates and careful review of EC communications and guidance documents are vital due to their frequent changes. Continuous contact with the Project Officer is crucial for addressing queries and seeking support. For large projects, the host institution should ideally fund a dedicated resource for project set-up and implementation for approximately six months (i.e., a project manager or administrator).

Conclusion

International recruitment had a strong impact on sustained internationalisation of the involved regions, with many fellows remaining in the UK and Denmark, and others returning to their home countries or other global destinations for employment. The programmes effectively promoted academic international mobility and the creation of global. Substantial support for mobility was required during recruitment to help fellows overcome challenges and to adhere to timeline. An interdisciplinary cohort model was effective in supporting fellows' training, careers, and wellbeing. was found to be particularly effective. Training programmes should focus on developing professional transferable skills and emphasise in-person networking and events. Given the complexity of MSCA/COFUND projects, effective project management is vital. Consistency through standardised procedures and good stakeholder communication is essential, but openness to change and adaptability is also important to refine processes throughout the projects. By sharing our 10 lessons from managing large MSCA/COFUND projects and detailing activities integral to the projects' success, we aim to support others in application, development, and management of similar projects. We also aim to increase awareness and transparency of the realities of these complex projects, particularly in international mobility and EDI.

Ethics and consent

No Ethical approval and consent is not required.

Disclaimer

The views expressed in this article are those of the authors. Publication in Open Research Europe does not imply endorsement by Horizon Europe.

Data availability

No data was generated or used within this article.

Authors' contributions

Idea conception (ESC, TM, JE), initial writing (ESC, TM), feedback (KSH, IR, AV, CI, CW, RA, JE, LN), all authors read and approved the final submitted manuscript.

Acknowledgements

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Publisher Full Text

Open Peer Review

Current Peer Review Status: ? ✗

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✗ **Mario Coccia**
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Ten lessons for future MSCA/COFUND applicants

The topics of this paper are interesting, though well known. The structure and content must be revised, and results have to be better explained by authors before to be reconsidered.

In **Title**, no acronyms to be clear to readers.

Abstract has to be clarified the goal, methods, and results with appropriate implication of research and education policies.

Introduction has to better clarify the research questions of this study, indicating the gap presents in literature that this study endeavors to cover, and provide more theoretical background about these issues, also considering the problems of gender to differentiate and providing specific recommendations. After that they can focus on the topics of this study to provide a correct analysis for fruitful discussion (See suggested readings that must be all read and used in the text).

The **methods** of this study is not clear. Authors have to clarify if this study is:
--A narrative review explains the existing knowledge on a topic based on all the published research available on the topic.
--A systematic review searches for the answer to a particular question in the existing scientific literature on a topic.
--A meta-analysis compares and combines the findings of previously published studies, usually to assess the effectiveness of an intervention or mode of treatment.

The section of **results** and **discussion** has to be clearly indicated. Now the structure is vague and

scientifically poor.
I suggest using some table, figure, graph to visualize better the results.

Discussion.
First, authors have to synthesize the main results in a simple table to be clear for readers and then show what this study adds compared to other studies.
Although the section provides a detailed description, there needs to be a more critical synthesis and comparison of the findings with the literature. The discussion has to be better connected to the introduction through the research questions, and the literature you reviewed. Either compare your results with the findings from other studies or use the studies to support your lessons. I suggest more specific actions for gender and also for research disciplines economics, is different from medicine, physics, etc.), considering the differences. Lessons cannot be valid for everyone and for all disciplines in a similar way.
Use the lessons learned for proposing recommendations that can help improve these aspects of careers developments, highlighting best practices with bullet points, based on incentive systems and theory of self-determination.

Conclusion has not to be a summary, but authors have to focus on manifold limitations of this study.
The Conclusion does not adequately discuss the theoretical and managerial implications of the study. Discuss how the gap in the literature has been addressed and make sure you create 3 subsections in the Conclusion: 1) Theoretical Implications, 2) Policy Implications, and 3) Ideas for Future Research.

Overall, then, the paper is interesting, but the structure is confusing. Theoretical framework is weak, and some results create confusion... structure of the paper has to be improved; study design, discussion and presentation of results have to be clarified using suggested comments.

I strongly suggest improving the paper by using all comments (suggested papers included reading and using all) and it can be considered.

Suggested readings.

Bagues, M., Sylos-Labini, M., Zinovyeva, N. 2017 (Ref-1). Does the gender composition of scientific committees matter? American Economic Review, 107 (4), pp. 1207-1238

Farré, L., Ortega, F. 2023 (Ref-2). Selecting Talent Gender Differences in Success in Competitive Selection Processes.Journal of Human Resources, 58(6), pp. 1881–1913

Coccia M. 2019 (Ref-3). Comparative Incentive Systems. A. Farazmand (ed.), Global Encyclopedia of Public Administration, Public Policy, and Governance, Springer , https://doi.org/10.1007/978-3-319-31816-5_3706-1

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Is the rationale for the Open Letter provided in sufficient detail? (Please consider whether existing challenges in the field are outlined clearly and whether the purpose of the letter is explained)

Partly

Does the article adequately reference differing views and opinions?

Partly

Are all factual statements correct, and are statements and arguments made adequately supported by citations?

Partly

Is the Open Letter written in accessible language? (Please consider whether all subject-specific terms, concepts and abbreviations are explained)

Partly

Where applicable, are recommendations and next steps explained clearly for others to follow? (Please consider whether others in the research community would be able to

implement guidelines or recommendations and/or constructively engage in the debate)
Partly

Competing Interests: No competing interests were disclosed.

Reviewer Expertise: research, innovation and education policies

I confirm that I have read this submission and believe that I have an appropriate level of expertise to state that I do not consider it to be of an acceptable scientific standard, for reasons outlined above.

Reviewer Report 02 January 2025

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?

Vrinda Acharya
Manipal Academy of Higher Education, Manipal, Karnataka, India

Ten lessons for future MSCA/COFUND applicants are very specific program programs.
The data needs to be validated here with any of the measurements or test scores from the participants.
The manuscript used very limited citations and literature to validate the program here. There are multiple doctoral projects already available at other institutions, countries and a discipline.
Here, the analysis and result have to be structured for a specific discipline.
The result has to be validated from the PhD scholar side also to validate the program model.

Is the rationale for the Open Letter provided in sufficient detail? (Please consider whether existing challenges in the field are outlined clearly and whether the purpose of the letter is explained)
Partly

Does the article adequately reference differing views and opinions?
Partly

Are all factual statements correct, and are statements and arguments made adequately supported by citations?
Partly

Is the Open Letter written in accessible language? (Please consider whether all subject-specific terms, concepts and abbreviations are explained)
Partly

Where applicable, are recommendations and next steps explained clearly for others to follow? (Please consider whether others in the research community would be able to implement guidelines or recommendations and/or constructively engage in the debate)
No

Competing Interests: No competing interests were disclosed.

Reviewer Expertise: Doctoral students' stress and well-being

I confirm that I have read this submission and believe that I have an appropriate level of expertise to confirm that it is of an acceptable scientific standard, however I have significant reservations, as outlined above.