



Increasing success and impact in MSCA projects

Insights & recommendations on the role of
Project Managers
in collaborative MSCA projects

September 2024

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The insights and recommendations outlined in this document are based on discussions from the workshop co-organised by the Marie Curie Alumni Association (MCAA) Research Management Working Group (RM WG) and EU-LIFE. These do not represent the official positions or conclusions of either EU-LIFE or the MCAA. The content is intended solely as a report of the workshop outcomes.

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Executive Summary

Project Managers (PMs) serve as the backbone of collaborative Marie Skłodowska-Curie Actions (MSCA), ensuring smooth coordination and implementation, with an obvious impact on the project's success. Responding to the increasing requirements and needs of MSCA projects, the versatile role of PMs is continuously evolving.

In this context, the Marie Curie Alumni Association (MCAA) Research Management Working Group (RM WG) and EU-LIFE, the alliance of independent research institutes across Europe, co-organised the "Steering Success in MSCA Projects: A World Café Workshop on the Evolving Role of Project Managers" in conjunction with the Conference "**Marie Skłodowska-Curie Actions: Diverse research careers to tackle Global Challenges**" in Toledo, Spain (November 2023). The workshop provided a dedicated space to exchange on the ever-evolving role of PMs and facilitated interactive discussions among diverse stakeholders within the MSCA ecosystem, including representatives of the European Commission (EC), the Research Executive Agency (REA), National Contact Points (NCPs), the MCAA, researchers and PMs from 14 countries. The discussions led to two differentiated outcomes:

1) **Insights on the current role of PMs in collaborative MSCA projects**, specifying their added value and unveiling the challenges they face, and

2) a set of **actionable strategies** to support the pivotal role of PMs in MSCA projects at three levels: the individual, institutional and EC level. The EC level recommendations also feed into the MCAA and **EU-LIFE contributions for the future of MSCA in FP10 within the 2024 MSCA consultation (February 2024)**.

Key insights

PMs increase the success and impact of MSCA projects

PMs play an overarching key role in numerous aspects of MSCA projects, from administrative and financial matters, including human resources, to communication and quality assurance. The added value of PMs contributes to the overall success of MSCA projects, making them more impactful, engaging and accessible to all involved stakeholders, including scientists and citizens, but also the funders.

The role and career perspectives for PMs lack definition

The role and expected performance of PMs in MSCA collaborative projects is not commonly perceived. Without clear career paths and prospects, and inadequate training opportunities, PMs struggle to see a future in their role. This can lead to reduced motivation and commitment.

PMs are insufficiently supported and recognised by host institutions and the EC

Despite perceived as pivotal by consortia members in MSCA collaborative projects, PMs are poorly supported and recognised at institutional and EC level. Many PMs operate without dedicated funding or institutional support, with prospect contracts often limited to the length of the project. This leads to resource constraints and a lack of recognition for the importance of their role, and ultimately, to a high turnover with a negative impact on projects, loss of knowledge and long-term higher investment in human resources from institutions.

Key recommendations

For the European Commission

Establish well-defined career paths for PMs and promote conditions to maximise and retain talent by:

- Developing a standardised competence and career framework for Research Managers, including PMs in MSCA projects.
- Offering official training programmes and project management guidelines endorsed by the European Commission to ensure uniformity and excellence in project management practices.
- Explicitly recognising and emphasising the importance of the PM role in the Work Programmes and funding guidelines.
- Including a protected budget specifically allocated for PMs in MSCA projects, thus establishing the PM role as a must-have position in MSCA projects.
- Improving sharing information on existing training through a database of customised training opportunities aligned with PMs' requirements.

For institutions

Promote a cultural shift within institutions that acknowledges the added value of PMs by:

- Creating sustainable PM positions through a top-down approach using institutional funds, overheads, or other financial formulas.
- Providing internal training programmes that focus on project management skills and collaboration with other departments, equipping PMs with the necessary knowledge and tools.
- Contributing to establishing well-defined career paths for PMs, including detailed job descriptions, career development plans for PMs and appraisal systems.
- Showcasing successful stories and best practices, highlighting how the expertise and contributions of PMs have positively impacted project outcomes.
- Empowering and recognising PMs by involving them in decision-making processes, project planning and strategy decisions.

For individuals

Maximise networking opportunities and advocate for a recognition of the PM role by:

- Actively sharing experiences and best practices with other PMs within the organisation and through PM networks.
- Establishing peer-to-peer mentoring programmes to help newcomers navigate the challenges of the role.
- Organising job fairs to showcase the value of the PM role and attract new talent.

The practical implementation of these recommendations will ensure that PMs continue to enhance the success and impact of MSCA projects.



“Steering Success in MSCA Projects: A World Café Workshop on the Evolving Role of Project Managers” Full report

This report encapsulates the outcomes of the World Café Workshop. Focusing on efficiency, standardisation, expertise, and career advancement, the workshop’s recommendations aim to improve the management of Marie Skłodowska-Curie Actions (MSCA) projects and contribute to the overall growth of the organisations involved through support and recognition to the Project Manager (PM) role.

The workshop’s participants shared their experiences, best practices, and perspectives on the value, challenges and requirements associated with project management in the context of MSCA projects. An interactive format was employed to facilitate in-depth discussions and gather insights from participants, who comprised representatives of the European Commission (EC), the Research Executive Agency (REA), National Contact Points (NCPs), the Marie Curie Alumni Association (MCAA), researchers and PMs from various universities and research organisations. A list of workshop organisers and participants is provided at the end of this document. Attendees were divided into four groups, each engaging in sequential discussions revolving around distinct topics: What is the added value of PMs in MSCA projects? What are the challenges they face? What is their recognition and appreciation? How should / will the PM role in MSCA projects evolve?

The discussions during the workshop highlighted the multifaceted role of PMs in MSCA and the varied levels of recognition and appreciation they receive, and emphasised the importance of enhancing career development opportunities, addressing funding disparities, and recognising the unique contributions of PMs.

Specifically, the discussions led to two differentiated outcomes:

- 1) **Insights on the current role of PMs in MSCA collaborative projects**, specifying their added value and unveiling the challenges they face.
- 2) A set of **actionable strategies** to support the pivotal role of PMs in MSCA projects at three levels: individual, institutional and EC level.

Insights on the current role of PMs in MSCA collaborative projects

Added value of PMs in MSCA projects

PMs have a holistic perspective on the project's goals and interdependencies. They work to align all project activities, from recruitment to communication and ethics, with the overarching project objectives to ensure the overall success of the project. The added value of PMs in MSCA projects impacts on the following areas:

Administrative, legal, and financial matters (including Human Resources)

- PMs are responsible for managing the project's budget, allocating resources to different activities, and ensuring that financial resources are used efficiently within the approved budget.
- PMs are involved in the recruitment processes within the project. They may participate in defining recruitment strategy, coordinating the selection process, ensuring that the selected researchers align with the project's goals and objectives and meet eligibility criteria.
- PMs ensure that all beneficiaries are properly keeping records of all supporting documents (in particular related to the recruitment) demonstrating the project activities and showing that the costs they declare are eligible.
- PMs may be responsible for drafting, reviewing, and managing contracts and agreements with project partners, vendors, or service providers. This includes employment agreements of the researchers, Grant Agreements, Consortium Agreements, and bi-lateral agreements between beneficiaries.
- In researchers' employment and for secondments that require team members to travel abroad, PMs may play a role in facilitating visa applications and travel arrangements, to ensure that project participants can attend meetings, conferences, or site visits without disruptions.
- PMs ensure that all team members and partners are well-informed about their responsibilities, rights and duties. They monitor progress, address any delays or issues, and report on the status of milestones and deliverables to relevant stakeholders. They assist in preparing and submitting progress reports, financial statements, and other documentation required by the EC or the REA.
- Handling intellectual property rights and patents can also fall under the PMs purview, liaising with relevant departments within the organisations and making sure that any innovations or discoveries during the project are early identified and appropriately protected.
- PMs often serve as mentors and provide guidance to researchers. They help researchers with their professional development plans, identify training needs, and ensure that they have the resources and support necessary to contribute effectively to the project.
- PMs often act as mediators, helping to resolve disputes, find common ground, and maintain a harmonious working environment within the project consortium.

Collaboration, communication and dissemination

- PMs facilitate communication with the Principal Investigators (supervisors), who are typically the lead researchers responsible for the scientific direction of the projects.
- PMs serve as the primary points of contact between the project consortium and the EC or the REA, which oversees and funds the project.
- PMs liaise with beneficiaries, which can include universities, research institutions, SMEs and other organisations participating in the project. PMs help coordinate communication among beneficiaries to foster collaboration and knowledge sharing. They facilitate effective communication and collaboration among partner organisations.
- PMs organise consortium meetings with participation of all project partners. In addition, MSCA projects involve workshops, training courses, conferences, and other events to facilitate knowledge exchange and collaboration. PMs also take on the role of organising these events, which includes selecting venues, managing logistics, coordinating guest speakers, and ensuring that events run smoothly.
- PMs manage project communication strategies, which can include developing communication plans, creating project websites, and leveraging various communication channels to reach target audiences. Effective communication is essential in MSCA projects to disseminate research findings, share progress updates, and engage with stakeholders.

Quality assurance, regulatory compliance and ethics

- PMs establish and enforce quality standards and processes to ensure that project deliverables meet predetermined quality criteria. They work closely with the project team to define quality objectives and monitor progress towards achieving them.
- PMs play a role in ensuring that the project complies with ethical standards, assisting in the preparation of ethics review applications, and monitoring ethical considerations throughout the project.
- PMs may implement quality control measures such as regular reviews to identify and address quality issues promptly.
- PMs ensure that the project complies with all relevant regulations and agreements. This includes, but is not limited to, compliance with the Grant Agreement and Consortium Agreement. In addition, PMs are also involved in raising awareness of relevant documents and guidelines (e.g. MSCA Green Charter and Guidelines on Supervision).
- PMs play a role in integrating gender, inclusion and diversity considerations into project planning and execution. In addition, they often steer and inform researchers and the consortium members on other transversal aspects of research, research culture and institutional policies.



Challenges faced by PMs in MSCA projects

The challenges faced by PMs in MSCA projects are multifaceted and revolve around role definition, training, career prospects, credibility, boundary setting, institutional support, appreciation and recognition.

- **Lack of role definition and credibility:** The lack of a well-defined and recognised role for PMs can lead to uncertainty and reduced credibility. PMs may struggle to articulate their responsibilities and contributions to project success, making it difficult for others to appreciate their role within the project and organisation.

- **Suboptimal training and undefined career perspectives:** Inadequate training opportunities for PMs can hinder their professional development. Without clear career paths and prospects, PMs may struggle to see a future in their role, leading to reduced motivation and commitment.

- **Insufficient institutional support and funding:** Many PMs operate without dedicated funding or institutional support. Their presence and activities depend on the goodwill of their institutions, which can lead to resource constraints and a lack of recognition for the importance of their role.

- **No boundary setting:** PMs often find themselves dealing with issues that are beyond their control or area of expertise, such as visa and pension matters. These responsibilities can be overwhelming and time-consuming, detracting from their core project management duties.

- **Limited recognition and appreciation:** The perception of recognition and appreciation for PMs in MSCA projects vary across different levels, with it being highest within the consortium team, followed by challenges at the institutional level, and limited support from the EC.

- **Within the host institution:** PMs working within institutions that host MSCA projects often face a perception of low recognition and appreciation. This can be attributed to several factors, including the lack of specific budget allocated for a PM position and the consequent funding discrepancy between researchers and PMs. In addition, the externalisation of the PM role to third-party entities is another challenge that hinders recognition at the institutional level as it can lead to a perception that PMs are expendable, further diminishing their recognition and job security. In countries with complex national bureaucracies, PMs may face challenges related to trust. This issue arises when the information provided by the PMs must be validated or double-checked by public administration for administrative matters.

- **By the European Commission (EC):** PMs in MSCA projects generally perceive the EC's appreciation as neutral, with limited support. While the EC acknowledges the importance of project management, there is currently no directive, career framework, or protected budget specifically allocated for PMs within MSCA projects.



Recommendations

The discussions held with participants resulted in a set of actionable strategies to support PMs to effectively navigate and lead in the ever-evolving landscape of MSCA projects. Here, the consolidated ideas and recommendations from our participants are presented, outlining the anticipated changes and enhancements in the PM role to align with the advancing needs of MSCA initiatives at three key levels: individual, institutional and EC-level.

Recommendations at the European Commission level

- **Recognition in Work Programmes:** Explicitly recognise and emphasise the importance of the PM role in the Work Programmes and funding guidelines. Recommend having a PM role in granted projects and encourage MSCA project evaluators to take the presence of a dedicated PM into account when assessing project proposals (with the exception of the MSCA Postdoctoral Fellowships, where it is not relevant).

- **Implementation in granted MSCA projects:** Ensure the PM role is implemented in granted MSCA projects. For example, having the Consortium Agreement as a mandatory deliverable, including the PM's role and corresponding use of the management costs for the position. It would simplify the negotiation of the Agreements and ensure that all parties involved have a common understanding of the PM's roles, responsibilities, and rights within the consortium.

- **Competence and career framework:** Develop a standardised competence and career framework for Research Managers that is adequate to PMs in MSCA projects, outlining the required skills, responsibilities, and growth opportunities.

- **PMs handbook of project management:** Develop a PMs handbook endorsed by the EC to provide a standardised approach to project management within the MSCA project that can be used by organisations, making it easier for PMs to follow established procedures, deliver consistent results and ensure excellence.

- **Code & charter:** Establish a code of conduct and a charter that define the ethical standards and best practices for PMs in EU-funded projects.

- **Official pan-PM training:** Offer official training programmes that address the needs of PMs in different EU projects as well as at various levels within an organisation. Training for PMs in MSCA projects should be run by the MSCA unit as regular training sessions, workshops, or courses. In addition, existing relevant online courses (EU academy, NCP academy, etc) should be better communicated and be opened to PMs, e.g. at the project start when they enter their role. These training opportunities should be listed in a database maintained by the EC, to which MSCA PMs could contribute, and advertised during the Coordinators Days. It would help PMs to stay updated on the latest MSCA-related project management methodologies, tools, and techniques. Format may follow the Coordinators Days scheme.

- **Strengthen the role of Euraxess / National Contact Points (NCPs):** Promote a stronger collaboration and communication between Euraxess, NCPs, and PMs to provide better support and guidance. In addition, equip Euraxess and NCPs with the necessary resources and expertise to provide accurate and comprehensive answers to PMs' queries, going beyond mere interpretation.

- **Follow-up PM careers:** Follow up on the next career steps of PMs after the end of a MSCA project through e.g. a follow up questionnaire addressed to PMs.

- **Allocate budget:** Establish a protected budget specifically allocated for PMs in MSCA projects. This budget could be structured as a percentage of overhead costs or through other formulas. This would ensure that PMs have the necessary resources and support to carry out their responsibilities effectively, thus enhancing their recognition within the institution. It is essential to distinguish between activities directly related to managing the project (management) and those that do not directly contribute to the project but are necessary for organisational operations (overhead), i.e. project management should be clearly indicated as an essential part of the project. It will allow the projects to allocate resources more efficiently, focus on project-specific tasks, and reduce unnecessary costs. Establishing a dedicated budget from the EC for PMs in MSCA projects would demonstrate a higher level of recognition for their crucial role in ensuring the successful implementation of these projects.



Recommendations at the institutional level

- **Stabilise PM positions:** Stabilise PM positions through a top-down approach using institutional funds, overheads, or other financial formulas.

- **Position creation:** Introduce positions that bridge the gap between pre-award and post-award functions, allowing for a smoother transition in project management responsibilities.

- **Internal training:** Provide internal training programmes that focus on project management skills and collaboration with other departments, equipping PMs with the necessary knowledge and tools. At the same time, acknowledge the set of transferable skills that PMs have, thus rendering their career highly adaptable and versatile.

- **Well-defined career paths:** Contribute to establishing well-defined career paths for PMs, including tailored job descriptions, career development plans for PMs and appraisal systems. This would provide PMs with a clear understanding of what is expected from them and offer a structured framework for career progression. By doing so, institutions can not only retain valuable PM talent but also ensure that these professionals continue to contribute effectively to the success of MSCA projects and beyond. For instance, career development plans for PMs could include goals, training requirements, mentorship opportunities, and promotion paths, helping PMs advance in their careers and contribute effectively to managing the MSCA project, future projects, and the organisation in general. In addition, it is relevant to clearly identify the specific knowledge, skills, experience, and competencies required for the PM. The project coordinators can ensure that they hire and assign individuals with the right qualifications to perform the PM tasks. It will also help in identifying areas where additional training or development may be needed to build necessary expertise.

- **Cultural shift:** Promote a cultural shift within the institution that acknowledges and values the contributions of PMs. This can involve raising awareness about the importance of project management roles and recognising PMs' expertise in research administration by:

- **Increase visibility:** Showcase successful stories and best practices, highlighting how the expertise and contributions of PMs have positively impacted project outcomes. In addition, give visibility to the PMs within the consortium to signify their importance and lead to greater recognition of their role among project partners.

- **Acknowledge the added value:** Actively engage with Principal Investigators (PIs) and other project stakeholders to show the added value of having a dedicated PM. The consequences of not having a PM include inefficiencies, delays, and increased costs.

- **Empower and recognise:** Empower and recognise PMs by involving them in decision-making processes, project planning and strategy decisions. Involving the PM from the early stage of the proposal preparation will help to maintain consistency, ensure that project objectives are met, and allow for timely deliverables, secondments, problem-solving and decision-making.



Recommendations at individual level and within a network of peers

- **Wider communication:** Foster communication and collaboration among PMs within the organisation and beyond to share experiences and best practices.

- **Mentoring:** Establish mentoring programmes where experienced PMs mentor newcomers, helping them navigate the challenges of the role.

- **Training opportunities database:** Collaborate with the EC to feed the database of available training opportunities specifically tailored to PMs' needs (see above in recommendations at the EC level).

- **Job fairs:** Organise job fairs or career development events to showcase the value of the PM role and attract new talent.



Abbreviations

EC	European Commission
FP10	10th Framework Programme for Research & Innovation
MCAA	Marie Curie Alumni Association
MSCA	Marie Skłodowska-Curie Actions
NCP	National Contact Point
PM	Project Manager(s)
REA	Research Executive Agency
RM WG	Research Management Working Group

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* The workshop had a total of 35 participants, representatives of the EC, the REA, NCPs, the MCAA, researchers and PMs from 14 countries. Please note that not all participants consented to have their data included in the participant list.

About EU-LIFE

EU-LIFE is an alliance of research centres whose mission is to support and strengthen European research excellence. EU-LIFE members are leading research institutes in their countries and internationally renowned for producing excellent research, widely transferring knowledge and nurturing talent. Since its foundation in 2013, EU-LIFE is a stakeholder in European policy participating regularly in the EU policy dialogue. More at www.eu-life.eu

About MCAA

The Marie Curie Alumni Association (MCAA) is an international non-profit, established by the European Commission and run by volunteers with a bottom-up approach. MCAA is a diverse alumni community for MSCA beneficiaries, celebrating career evolution beyond research. It offers lifelong career support, networking, and advocacy, extending MSCA benefits throughout members' careers. MCAA fosters dialogue, influences science policy, and supports the research community across various career paths.