

## **2010 WORK PROGRAMME**

# ***PEOPLE***

***(European Commission C(2009)5892 of 29 July 2009)***

### ***How to use the Work Programme (WP)***

*The WP is to be read in association with the relevant Guides for Applicants. The most current Guides and other documents are available on CORDIS under [www.cordis.europa.eu/fp7/PEOPLE](http://www.cordis.europa.eu/fp7/PEOPLE).*

***Part I** describes the background to the WP and the broad policy objectives. **Part II** gives details of the 2010 Actions, while **Part III** gives the corresponding information, in overview form, of the relevant calls. **Part IV** lists other activities not implemented through calls for proposals. The Annexes contain reference material.*

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## I CONTEXT

### Objective

The People Specific Programme<sup>1</sup> of the 7<sup>th</sup> Framework Programme (2007 to 2013) acknowledges that one of the main competitive edges in science and technology is the quantity and quality of its human resources. To support the further development and consolidation of the European Research Area (ERA), the overall strategic objective is to make Europe more attractive for researchers. The Specific Programme aims to strengthen, quantitatively and qualitatively, the human potential in research and technology in Europe, by stimulating people to take up the profession of a researcher, encouraging European researchers to stay in Europe, and attracting to Europe the best researchers from the entire world. It is implemented by systematic investments in people, mainly through a coherent set of Marie Curie Actions, particularly taking into account the European added value in terms of their structuring effect on the European Research Area. These actions address researchers at all stages of their careers, in the public and private sectors, as well as knowledge transfer between sectors, and with the rest of the world. Efforts will also be made to increase participation by women researchers, by designing the actions to ensure that researchers can achieve an appropriate work/life balance and by facilitating resuming a research career after a break.

A strong participation by enterprises, including SMEs, is considered a crucial added value for this programme. The enhancement of industry-academia cooperation in terms of research training, career development and knowledge sharing, taking into account the protection of intellectual property rights, is encouraged throughout.

The Marie Curie actions are open to all domains of research and technological development addressed under the EC Treaty and research fields are chosen freely by the applicants.

The People Specific Programme has an overall budget of over EUR 4.7 billion over the seven years of FP7. The Marie Curie actions will be implemented under five headings, with the following indicative budget breakdown:

<b>Activities</b>	<b>Indicative budget share 2007-2013</b>
<b>1. Initial Training of Researchers</b>	around 40 %
<b>2. Life-long Training and Career Development (including Co-funding)</b>	between 25% and 30%
<b>3. Industry-Academia Pathways and Partnerships</b>	5 to 10%
<b>4. International Dimension – World Fellowships<sup>2</sup></b>	25 to 30%
<b>5. Specific Policy Actions</b>	around 1%

<sup>1</sup> In accordance with Articles 163 to 173 of the EC Treaty, and in particular Article 166(1) as contextualised in the following decisions: Decision 1982/2006/EC of the European Parliament and of the Council of 18.12.2006 concerning the 7<sup>th</sup> Framework Programme of the European Community for Research, Technological Development and Demonstration (2007-2013) and the Council Decision 973/2006/EC of 19.12.2006 adopting a Specific Programme for Research, Technological Development and Demonstration: 'People' (2007-2013)

<sup>2</sup> The International Dimension activity includes the newly launched Marie Curie World Fellowships (OIF, IIF, IRSES), as well as the other actions having an impact on international cooperation and transfer of knowledge. These include International reintegration grants (IRG) as well as the host-driven actions ITN and IAPP, which, while having their focus on the European Research Area, are open to researchers and participant organisations from third countries. In this work programme, the World Fellowship actions will be regrouped as an operational activity block; whereas the other actions under the International dimension activity will be included under the other headings in the table. The budgetary breakdown refers to the totality of the actions with an international impact.

## General introduction and approach for 2010

Within the existing Framework Programme legislation, this work programme is a further step in the implementation of the Specific Programme and fully supports the researchers' related ERA-initiatives as proposed by the Commission in 2008<sup>3</sup>, which seek to make Europe decisively more attractive for researchers and to establish a balanced "brain circulation" within the EU as well as with third countries.

The work programme covers the implementation of Marie Curie actions and policy actions to enhance the training, mobility and career development of researchers in the ERA and its international dimension. At this stage all the elements foreseen in the Specific Programme legislation have been implemented, and the present work programme aims to consolidate the Marie Curie Actions, taking into account the experience gained through the first calls and considering the need for a smooth transition phase after the start-up of the Research Executive Agency (REA) in 2009. The work programme includes a number of policy initiatives to be launched or reinforced in support of the European researchers' partnership.

Mobility of researchers remains the key objective of the People programme, and the mobility rules of the Marie Curie Actions have been clarified throughout this work programme.

Inter-sectoral mobility between academia and industry is also a priority as a means to improve interaction between the two sectors and to eliminate cultural and other mobility barriers. At the same time it plays a structuring role through a wider skills and career development of researchers and impacts positively on their employability. This issue is particularly addressed through the host-driven actions, and in this context, the need for involvement of commercial partners in the Marie Curie Initial Training Networks (ITN) has been further emphasised in the present work programme.

Favourable employment and working conditions are essential for attractive research careers. In that respect the Marie Curie actions are leading by example through fostering the importance of working and employment conditions and competitive salaries, in particular through a system of adequate family and career development allowances, and annual adjustments of salaries. In that sense and in particular more recently through the new action of co-funding national fellowship programmes, Marie Curie actions favour an accelerated take-up of the principles of the Researchers Charter and Code. The principle established in 2008 of adapting the salary rates to the overall inflation, and of updating the country specific correction factors, has been maintained in this work programme. The rates of the Community contribution under the IRSES scheme have also been adapted to inflation.

In relation to the People programme's aim to ensure equal opportunities, this work programme introduces a special career restart panel under the Marie Curie Intra-European Fellowships (IEF) that aims to encourage researchers to return to research after a career break.

International cooperation is promoted through a series of 'World-fellowships': re-integration in Europe of researchers having been active abroad; enabling European researchers to acquire new knowledge in third countries; and reinforcing research cooperation through welcoming world class researchers from third countries in Europe and by networking with key partners abroad, in particular through an exchange of research staff. EURAXESS also promotes international cooperation through networking of European researchers abroad, and foreign researchers in Europe.

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<sup>3</sup> "Better careers and more mobility: a European partnership for researchers" (COM(2008)317 final of 23 May 2008) and "A strategic Framework for EU International S&T cooperation" (COM(2008)588 final of 24 September 2008)

The overall objective of the European Partnership for Researchers as proposed by the Commission and endorsed by Council in 2008 in the frame of the development of the European Research Area, is to accelerate the realisation of a genuine European labour market for researchers in partnership with and among Member States. The present work programme includes in particular activities for continued support for the implementation of the partnership. This is achieved notably through EURAXESS-Researchers in Motion (in particular Rights, Services, Jobs and Links), through further data-collection and analysis concerning mobility patterns and career paths, as well as through a Presidency conference on researchers.

Applicable to all actions and activities, this work programme contains the funding schemes to be used, the eligibility criteria and the criteria for proposal evaluation and project selection, including award criteria. It may also identify organisations which will receive support for specific actions.

In preparing this work programme, the Commission has taken into account advice from the 'People' Advisory Group<sup>4</sup>.

### **Registration of legal entities in the Commission's Early Warning System (EWS) and Central Exclusion Database (CED)**

The Commission uses an internal information tool (EWS), as well as a database available to public authorities implementing EU funds (CED) to flag identified risks related to beneficiaries of centrally managed contracts and grants with a view to protecting the EU's financial interests.

#### Prior Information of Candidates, Tenderers and Grant Applicants

Candidates, tenderers, grant applicants and, if they are legal entities, persons who have powers of representation, decision-making or control over them, are informed that, should they be in one of the situations mentioned in:

- the Commission Decision of 16.12.2008 on the Early Warning System (EWS) for the use of authorising officers of the Commission and the executive agencies (OJ, L 344, 20.12.2008, p. 125), or
- the Commission Regulation of 17.12.2008 on the Central Exclusion Database – CED (OJ L 344, 20.12.2008, p. 12),

their personal details (name, given name if natural person, address, legal form and name and given name of the persons with powers of representation, decision-making or control, if legal person) may be registered in the EWS only or both in the EWS and CED, and communicated to the persons and entities listed in the above-mentioned Decision and Regulation, in relation to the award or the execution of a procurement contract or a grant agreement or decision.

More information on the EWS and CED, can be found here:

[http://ec.europa.eu/budget/sound\\_fin\\_mgt/ews\\_en.htm](http://ec.europa.eu/budget/sound_fin_mgt/ews_en.htm)

*The activities in sections II, III, IV 4.5 and IV 4.6 of this work programme will be implemented by the Research Executive Agency (REA) once this is operating autonomously according the provisions of the Commission decision C/2008/3980 of 31/7/2008 "delegating powers to the Research Executive Agency with a view to performance of tasks linked to implementation of the specific Community programmes People, Capacities and Cooperation in the field of research comprising, in particular, implementation of appropriations entered in the Community budget".*

<sup>4</sup> [http://ec.europa.eu/research/fp7/advisory\\_en.html](http://ec.europa.eu/research/fp7/advisory_en.html).

## Terms used in this work programme

Researchers addressed under the 'People' Specific Programme are of at least postgraduate or equivalent level and are classified on the basis of professional experience (see definitions below).

### ***Definitions used throughout this work programme*** (Italics in the text imply these definitions)

***Early-stage researchers*** are defined as those who are, at the time of selection by the host organisation, in the first four years (full-time equivalent) of their research careers. This is measured from the date when they obtained the degree which would formally entitle them to embark on a doctorate, either in the country in which the degree was obtained or in the country in which the research training is provided, irrespective of whether or not a doctorate is envisaged.

***Experienced researchers*** must, at the time of the relevant deadline for submission of proposals or selection by the host organisation, depending on the action, **either** be in possession of a doctoral degree, irrespective of the time taken to acquire it, **or** have at least four years of full-time equivalent research experience.

***Mobility***: at the time of the relevant deadline for submission of proposals, or selection by the host organisation, depending on the action, researchers must not have resided or carried out their main activity (work, studies, etc) in the country of their host organisation for more than 12 months in the 3 years immediately prior to the reference date. Short stays, such as holidays, are not taken into account. As far as international European interest organisations or international organisations are concerned, this rule does not apply to the hosting of eligible researchers, however the appointed researcher must not have spent more than 12 months in the 3 years immediately prior to the reference deadline for submission of proposals or selection by the host organisation, depending on the action, in the same appointing organisation.

***Research organisations***: are defined in the rules for participation<sup>5</sup> as a 'legal entity established as a non-profit organisation which carries out research or technological development as one of its main objectives.

***Third Countries*** are countries which are neither EU Member States nor countries associated to FP7 (Associated countries)

## Implementation principles

The Marie Curie actions are open to all domains of research and technological development addressed under the EC Treaty. Research fields are chosen freely by the applicants in a 'bottom-up' manner. Projects that can be covered by the Euratom Treaty are excluded from funding.

All research carried out under this work programme must respect fundamental ethical principles, and the requirements set out in the text of the 'People' Specific Programme.

The actions will be implemented on the basis of open, quality-driven European wide competition, with excellence of the project and participants, impact of the project and the implementation capacity and quality of the participants as the selection criteria. A limited number of actions will be implemented by service contracts or other Commission procedures.

Trans-national and intersectoral mobility is a key feature and a strong participation by enterprises, in particular SMEs, is considered an important added value. The enhancement of industry-academia cooperation in terms of research training, career development and

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<sup>5</sup> Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, page 1] – hereafter "EC FP7 Rules for Participation".

knowledge-sharing is encouraged. The definition of industry goes beyond the traditional manufacturing and/or production industries and comprises enterprises in the general sense of commercial economic actors.

The international dimension is addressed by actions aiming to strengthen and enrich international cooperation through researchers and to attract research talent to Europe. Most of the Marie Curie actions are open to *third country* researchers. Also, depending on the scheme, the participation of legal entities from *third countries* and of international organisations is foreseen under the conditions provided by the Rules for Participation<sup>6</sup> (for details see each relevant Action in part II). Moreover, the 4<sup>th</sup> Activity – the Marie Curie World Fellowships – is explicitly targeted to widen the international appeal for researchers to move to and from Europe. Beyond the individual fellowships, the International Research Staff Exchange Scheme (IRSES) provides the possibility to strengthen cooperation between European *research organisations* and *research organisations* of International Cooperation Partnership Countries (ICPC), European neighbourhood countries, and countries with which the EU has concluded Science and Technology agreements. Whereas the fellowship schemes de facto favour applications to countries with established scientific reputation, the IRSES action contributes to widening the geographical balance by giving an additional incentive for cooperation with ICPC.

The programme aims to ensure gender mainstreaming by encouraging equal opportunities in all Marie Curie actions and by benchmarking gender participation, with a view of achieving a broad balance over the period of the Framework Programme. The target of at least 40% participation by women set in earlier work programmes is maintained for 2010. The actions will be designed to ensure that researchers can achieve an appropriate work/life balance and will contribute to facilitate resuming a research career after a break. Although as a general rule fellowships are expected to be full-time, flexibility is possible for instance in terms of splitting a fellowship into more than one stay, or through part-time working, if justified and appropriate in the frame of the project implementation.

In the implementation of the Marie Curie actions, attention is also paid to the working conditions, transparency of recruitment processes, and career development as regards the researchers recruited on projects and programmes funded. For this the Commission Recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers<sup>7</sup> offers a reference framework, while respecting its voluntary nature.

Proposals covered by this work programme will, depending on the action, be submitted either by one or several organisations or by an individual researcher in liaison with a host organisation. In actions where an individual researcher in liaison with a host organisation can apply, the researcher cannot have more than one proposal in any individual action application procedure at any one time and cannot benefit, at the same time, from more than one Marie Curie action. For this particular purpose the application procedure is deemed to have terminated for a proposal with the notification of its rejection, of it being placed on a reserve list, or of it being recommended for funding.

In case of multiple submissions by a research or research funding organisation, the applicant entity may be asked to demonstrate the capacity to participate in all of those proposals simultaneously, in terms of research staff, infrastructure and management.

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<sup>6</sup> EC FP7 Rules for Participation.

<sup>7</sup> Commission recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers, C(2005) 576 of 11.3.2005.

In case of submission of a proposal concerning a project in the same field for which the applicant/participant has already previously received Community financing under the 7th Framework programme, other Community programmes or under previous Framework Programmes, the applicant has to demonstrate the substantial added value of the new project in relation to the project previously financed.

### **Distribution of the indicative budget**

For Initial Training Networks (ITN), Intra-European Fellowships for career development (IEF), International Outgoing Fellowships for Career Development (IOF), and International Incoming Fellowships (IIF), the distribution of the indicative budget of any given call over the scientific disciplines will be based on the number of eligible proposals received, which are allocated to one of the scientific panels<sup>8</sup>.

For Reintegration Grants (RG) the distribution of the indicative budget of the call between the panel European Reintegration Grants (ERG) and the panel International Reintegration Grants (IRG) will be based on the requested Community contribution of the eligible proposals received. Given the limited number of proposals expected, the two RG panels will be evaluated in multi-disciplinary panels.

For COFUND the distribution of the indicative budget of the call between panel (A) 'Existing trans-national fellowship programmes' and panel (B) 'New fellowship programmes with transnational mobility' will be based on the requested Community contribution of the proposals positively evaluated. Given the specific nature of the action, and in particular the fact that most proposals are expected to be multi-disciplinary programmes, the two COFUND panels will be evaluated in multi-disciplinary panels.

For all calls where proposals are allocated to panels, a ranked list will be established for each panel. If the budget allocated to one of the panels exceeds the requirements of all proposals positively evaluated<sup>9</sup> in that panel, the excess budget will be transferred to other panels following the above repartition mode. Equally, if the allocated funding to one panel is insufficient to fund the highest ranked proposal in that panel, necessary budget will be transferred from other panels in order to ensure that the highest ranked proposal can be funded.

For the International Research Staff Exchange Scheme (IRSES) and Researchers Night (NIGHT), proposals will be evaluated in a single multi-disciplinary panel and there will be a single ranked list for each of the actions.

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<sup>8</sup> The Marie Curie scientific panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**. The IEF scheme includes an additional multidisciplinary career restart panel.

<sup>9</sup> Measured as proposals having passed all relevant evaluation thresholds

## II CONTENT OF CALLS IN 2010

### Activity 1: Initial Training of Researchers

#### 1.1 MARIE CURIE ACTION: INITIAL TRAINING NETWORKS (ITN)

##### Call Reference FP7-PEOPLE-2010-ITN

##### **1.1.1 Introduction and objective of the action**

This action aims to improve career perspectives of *early-stage researchers* in both public and private sectors, thereby making research careers more attractive to young people. This will be achieved through a trans-national networking mechanism, aimed at structuring the existing high-quality initial research training capacity throughout Member States and Associated countries. Direct or indirect involvement of organisations from different sectors, including (lead-) participation by private enterprises in appropriate fields, is considered essential in the action. In particular, the action aims to add to the employability of the recruited researchers through exposure to both academia and enterprise, thus extending the traditional academic research training setting and eliminating cultural and other barriers to mobility.

For the purposes of this action, the private sector is understood to comprise organisations gaining the majority of their revenue through competitive means with exposure to commercial markets.

The action will be implemented by supporting competitively selected networks of organisations from different countries engaged in research training. The networks will be built on a joint research training programme, responding to well identified training needs in defined scientific or technological areas, with appropriate references to interdisciplinary and newly emerging supra-disciplinary fields.

The action will be primarily for researchers from Member States and Associated countries, but also open to researchers from *third countries*.

##### **1.1.2. Technical content/scope**

**Participants (Full network partners):** A participant in this action is an organisation that is a full member of a network selected by the Commission. It contributes directly to the implementation of the joint training programme of the network, by recruiting and employing eligible researchers, by providing specialised research training, complementary training, and secondment opportunities and by participating in other dedicated network actions as well as in the supervisory board of the network. Full network partners are signatories to the grant agreement and take complete responsibility for executing the proposed training programme.

**Associated partners:** Associated partners are not signatories to the grant agreement, and do not recruit any researchers, but provide research and complementary training, and/or secondment opportunities, and participate in the supervisory board. Associate partnership is open to both public and private sector organisations. Each associated partner must include a letter of commitment in the proposal to ensure their real and active participation in the network .

ITNs are typically set up as multi-partner networks, but mono-partner ITNs are also possible under certain conditions.

Multi-partner networks are composed of at least three participants (e.g. universities, public non-commercial research centres, non-profit or charitable organisations, commercial companies, SMEs etc.) established in at least three different Member States or Associated countries. Above this minimum, the participation of *third countries* and of international organisations is foreseen under the conditions provided by the EC FP7 Rules for Participation.

Mono-partner ITNs include a single participant and a network of associated partners. The single participant shall be established in a Member State or Associated country.

In order to ensure that researchers are trained in a suitably intersectoral environment to fully acquire the skills necessary for them to participate in a range of roles in the modern knowledge economy, the active involvement of commercial enterprises in the research training programme is considered essential.

The involvement of private sector enterprises is foreseen at two levels:

- Level 1: Full network partner (i.e. a participant),
- or**
- Level 2: Associated partner

Participation of commercial enterprises at level 1 is highly encouraged. In all cases, the degree of involvement and commitment of commercial partners will be assessed by the expert evaluators under each of the evaluation criteria.

In cases of mono-partner ITNs, the single participant needs to demonstrate clearly that the necessary elements of the research training programme (including the issue of mutual recognition of the training quality by all associated partners, whether from enterprise or academia) are effectively addressed through well-established, trans-national collaborations with a wider set of partners, including from the private sector. The trainees are expected to benefit from these networks of associated partners, including through active mobility between the single participant and the associated partner organisations during the training period.

**Training Programme:** Participants of the network will apply for support through a joint training programme. These training programmes will address in particular the development and broadening of the research competences of the *early-stage researchers*.

Training will be primarily focused on scientific and technological knowledge through research on individual, personalised projects. This will be complemented by substantial training modules addressing other relevant skills and competences, e.g. in the field of management and financing of research projects and programmes, intellectual property rights and other exploitation methods of research results, entrepreneurship, ethical aspects, communication and societal outreach.

Attention should be paid to the quality of the joint research training programme, with provision for supervision and mentoring arrangements and career guidance, while exposing the researchers to other disciplines and sectors represented in the network through visits, secondments and other training events. The joint training programme shall exploit complementary competences of the participants in the network, including from industry, as well as synergies with any associated partners, and should reflect existing or planned research collaborations among the partners. It shall require the mutual recognition of the quality of the training and, if possible, of diplomas and other certificates awarded.

Each network will have a clearly identified supervisory board co-ordinating network-wide training. The board will be composed of the network participants and associated partners, and may also include any other stakeholders of relevance to the training programme. The board will ensure an adequate balance between scientific and technological training through personalised research projects and complementary skills training, appropriate to the needs of each recruited researcher. Involvement of commercial enterprises in the supervisory board aims to ensure that the skills requirements for the researchers are defined on the basis of a thorough understanding of the sectoral needs of both academia and enterprise to enhance the

intersectoral employability of the researchers. The supervisory board will also establish active and continuous communication and exchange of best practice among the network participants to maximise the benefits of the partnership.

Training events offered within the network (e.g. conferences, summer schools and specialised training courses), may also be open to external researchers.

The size of the joint training programme and of the network will depend on the nature and scope of the training activities to be undertaken by the network, as well as on considerations regarding management and effective interaction among the participants.

The maximum duration of the programme to be supported will normally be four years from the date of commencement specified in the contract.

Each researcher recruited for initial training will establish, together with her/his personal supervisor in the host organisation, a Personal Career Development Plan comprising his/her training and career needs (including complementary skills) as well as the scientific objectives and will later on report upon the success with which these objectives were met. In this way the researchers will be encouraged to play an active role in shaping their own training programme and professional development.

**Eligible researchers:** This action supports the initial training of researchers, typically during the first five years (or full-time equivalent) of their careers in research. The initial training phase is predominantly directed at *early-stage researchers*, and includes inter alia training in the frame of doctoral programmes. Support for *early-stage researchers* will be for periods of 3 to 36 months. The initial training can also be directed to *experienced researchers* as long as they are within the first five years mentioned above. In this case support, based on the definition of *experienced researchers*, will be limited to 24 months maximum. In all cases eligibility will be determined at the time of recruitment.

The total period for support of a researcher under each network will be limited to 3 years overall. An individual researcher may not be recruited as an *early-stage researcher* and subsequently as an *experienced researcher* within the same network.

With a view to complementing a network's capacity to transfer new knowledge and strengthen supervision, the action can also support the setting up of a limited number of senior “visiting researchers” positions (both in public sector and enterprise partners) for *experienced researchers*. Support for such positions would be typically for multiple stays within the network, with a total duration of at least one month.

Visiting researchers addressed under this action must be *experienced researchers* with outstanding past achievements in international training and collaborative research, and may originate from the private sector, as well as the public sector.

**Rules of mobility applicable to eligible researchers:** Researchers must comply with the rule for *mobility* at the time of selection by the host organisation.

**Community Contribution, Rates and Evaluation Criteria:** The Community contribution and rates under this action are based on the Funding Scheme “Support for training and career development of researchers”, set out in Annex 3 of this Work Programme and shall be associated to:

- the recruitment of researchers to be trained;
- networking costs and the organisation of short training events (workshops, seminars, summer schools and conferences).

- where applicable, the recruitment of the senior “visiting researchers”;

The evaluation, selection and award criteria are set out in Annex 2.

### ***1.1.3. Expected impact of the action***

Projects under the action are to contribute to the structuring of existing high-quality initial research training capacity throughout Europe in both public and private sectors. By bringing complementary providers of research-training from different countries, sectors and disciplines together to focus their efforts in broad initial training programmes, the projects under this action are expected to enhance industry-academia cooperation in terms of research training and knowledge-sharing and to deliver better overall quality of initial research training in Europe. This will not only help to develop future generations of researchers more capable of contributing effectively to the knowledge-based economy and society, within and between public and private sectors, but also add to the intersectoral and trans-national employability of these researchers and to the attraction of young people to a research career.

## **Activity 2: Life-long Training and Career Development**

### **2.1 MARIE CURIE ACTION: INTRA-EUROPEAN FELLOWSHIPS FOR CAREER DEVELOPMENT (IEF)**

*Call Reference FP7-PEOPLE -2010-IEF*

#### ***2.1.1. Introduction and objective of the action***

This action is to support the career development, or restart, of *experienced researchers* at different stages of their careers, and seeks to enhance their individual competence diversification in terms of skill acquisition at multi- or interdisciplinary level and/or by undertaking intersectoral experiences. The aim is to support researchers in attaining and/or strengthening a leading independent position, e.g. principal investigator, professor or other senior position in education or enterprise.

The action may also assist researchers to resume a career in research after a break. To assure equal opportunities to all proposals, applicants for such proposals can apply to be evaluated in a specific multi-disciplinary panel. This 'career restart panel' is restricted to researchers having, at the deadline of submission, not been active on a fellowship, or employed under contract, in research for at least 12 months.

Support is foreseen for individual, trans-national, intra-European fellowships awarded directly at Community level, to the best and most promising researchers active in Member States or Associated countries, based on an application made by the researchers in conjunction with the host organisations.

#### ***2.1.2. Technical content/scope***

**Projects and participants:** This action provides financial support for advanced training and trans-national mobility, for a period of 12 to 24 months (full-time equivalent), for individual projects presented by *experienced researchers* active in Member States or Associated countries in liaison with a host organisation from another Member State or Associated country.

The research topic will be chosen by the researcher in collaboration with the host, with a view to achieving a diversification of competences and developing his/her career in a European context.

Each researcher will establish, together with her/his personal supervisor in the host organisation, a Personal Career Development Plan comprising his/her training needs (including complementary skills) and scientific objectives and will later on report upon the success with which these objectives were met. In this way the researchers will be encouraged to play an active role in shaping their own training programme and professional development.

**Eligible researchers:** The action addresses *experienced researchers* who are at a stage of their career when they can benefit from a life-long training and career development measure. This includes researchers with a more senior profile in terms of experience as well as those who wish to resume their research career after a break. Researchers shall be considered eligible under this action if, at the time of the relevant deadline for submission of proposals, they fulfil the requirements for being qualified as *experienced researchers*.

**Rules of mobility and nationality applicable to eligible researchers:** Applicants can be of any nationality. They must demonstrate mobility from a Member State or Associated country to another Member State or Associated country, and must comply with the rule for *mobility* at the deadline for submission of proposals. The benefit of the proposed mobility will also be assessed during evaluation in terms of benefit for the ERA.

**Community Contribution, Rates and Evaluation Criteria:** The Community rates are those for the funding scheme Support for Training and Career Development of Researchers, as set out in Annex 3 of this work programme. The evaluation, selection and award criteria are set out in Annex 2.

### ***2.1.3. Expected impact of the action***

Rather than merely providing employment opportunities for *experienced researchers*, this action aims to catalyse significant development in researchers' careers, specifically by adding different and/or complementary research competences at an advanced level, in the process of reaching and/or reinforcing a position of professional maturity or to permit them to resume a research career. Projects are therefore expected to add significantly to the career development of the best and most promising researchers active in Europe, in order to enhance and maximise their contribution to the knowledge-based economy and society.

## 2.2 MARIE CURIE ACTION: REINTEGRATION GRANTS (RG)

This action will be implemented by two sub-actions, the European Reintegration Grants (ERG) and International Reintegration Grants (IRG).

### Call References FP7-PEOPLE-2010-RG

Applications can be submitted continuously and will be evaluated and selected at regular intervals, based on cut-off dates, from the date of publication of the call. When a proposal is submitted after the final cut-off date for a call it will be carried over to the first cut-off date of the appropriate subsequent call.

### 2.2.1 European Reintegration Grants (ERG)

#### 2.2.1.1 Introduction and objective of the action

The ERG action aims at assisting *experienced researchers* in the (re)integration into a research career after a trans-national mobility experience within the frame of the Marie Curie actions. The action encourages the researchers to build on their trans-national mobility period in the context of a coherent professional project and to promote the perspectives of the development of their research career.

#### 2.2.1.2 Technical content/scope

**Projects and participants:** The action offers the opportunity for *experienced researchers* to capitalise on their trans-national mobility period after having participated in a Marie Curie action under the 7th or previous Framework Programmes.

The mechanism will assist the professional (re)integration of the eligible researchers in an organisation active in research in a Member State or Associated country, including in their country of nationality.

The proposal, consisting of a research project to be executed at the proposed (re)integration host institute, will have to be submitted by the researcher in conjunction with the proposed host, at the earliest one year before the end of the initial Marie Curie fellowship and not later than six months following its end.

Grant agreements will be issued with the (re)integration host in a Member State or Associated country, which will commit itself to provide the researcher with a work contract for a period of at least the duration of the (re)integration grant.

**Eligible Researchers:** Researchers shall be considered eligible under this action if, at the time of the relevant cut-off date, they fulfil the requirements for being qualified as *experienced researchers*.

Researchers must be benefiting at the time of application or have previously benefited from a training and mobility action under the 7th or one of the previous Framework Programme<sup>10</sup> of at least 18 months full-time equivalent.

**Rules of mobility and nationality applicable to eligible researchers:** Applicants can be of any nationality. They must be hosted by an organisation located in a Member State or Associated country.

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<sup>10</sup> FP 6 *Marie Curie Actions* eligible in this context are: *Marie Curie Research Training Networks*; *Marie Curie Host Fellowships for Early Stage Research Training (EST)*; *Marie Curie Host Fellowships for the Transfer of Knowledge (ToK)*; *Marie Curie Intra-European Fellowships (EIF)*, *Marie Curie Excellence Grants (EXT)*. FP7 *Marie Curie Actions* eligible in this context are: *Initial Training Networks (ITN)*; *Intra-European Fellowships for Career Development (IEF)*; *International Incoming fellowship (IIF)*, *Industry-Academia Partnerships and Pathways (IAPP)*.

**Community Contribution, Rates and Evaluation Criteria:** The grant, which can cover a period of two up to three years, is a fixed-amount contribution to the employment and/or research costs of the researcher at the reintegration host. The Community rates are those for the funding scheme Support for Training and Career Development of Researchers, as set out in Annex 3, Table 3.4 of this work programme. The evaluation, selection and award criteria are set out in Annex 2.

### ***2.2.1.3. Expected impact of the action***

Projects under this action are expected to contribute significantly to brain circulation in the European Research Area, thereby providing organisations active in research in both private and public sectors with opportunities to benefit from the knowledge and experience gained by researchers during their initial mobility experience, while at the same time adding to these researchers' career development at European level and helping to enhance their employability.

## **2.2.2 International Reintegration Grants (IRG)**

### ***2.2.2.1. Introduction and objective of the action***

The objective of this action is to reinforce the attractiveness of Europe by encouraging European researchers who have carried out research outside Europe for at least three years, to reintegrate in a Member State or in an Associated country in order to contribute to European research and transfer the knowledge they have acquired in a *third country*, by offering them the opportunity to capitalise on their experience in Europe. It is aimed at countering European brain drain to *third countries*. It should also allow the development of lasting co-operation with the scientific and/or industrial environment of the *third country* from which they have returned.

### ***2.2.2.2. Technical content/scope***

**Projects and participants:** This action consists of financial support for between two and four years for professional (re)integration projects in the research area in a host organisation active in research in a Member State or Associated country. The project can, amongst other things, address research activities, training, teaching, transfer of knowledge, commercial exploitation, diffusion, development of co-operation with the scientific and/or industrial sector of the *third country* from which the researcher is returning.

For selected projects, a grant agreement is issued with the reintegration host organisation, which will commit itself to ensure an effective and lasting professional integration of the researcher for a period of at least the same duration as the project. Evidence that the researcher will be integrated in the host organisation on this basis for a longer term will be positively taken into account during evaluation.

The scheme is intended to improve considerably the prospects for the permanent reintegration of European researchers in Europe. Normally the scheme is intended to encourage researchers who have not yet gained employment in Europe to do so. In exceptional cases, applications from researchers who are already employed by a European organisation active in research at the time of the submission will be considered, but they must demonstrate significant improvement in their employment conditions or career prospects.

Projects will be selected by the Commission on the basis of a proposal submitted by an eligible researcher in liaison with a host organisation.

**Eligible researchers:** Researchers shall be considered eligible under this action if, at the time of the relevant cut-off date, they fulfil the requirements for being qualified as *experienced researchers*.

**Rules of mobility and nationality applicable to eligible researchers:** Applicants must be nationals of a Member State or Associated country, and must at the respective cut off date, have been active in research in a *third country* for at least 3 years (full-time equivalent). They must be hosted by an organisation located in a Member State or Associated country.

At the time of the relevant cut-off date, applicants should not have spent more than 12 months in Member States or Associated countries during the previous 3 years (short stays, such as holidays, are not taken into account).

**Community Contribution, Rates and Evaluation Criteria:** The grant which can cover a period of 2 to 4 years is a fixed-amount contribution to the employment and/or research costs of the researcher at the reintegration host. The Community rates are those for the funding scheme Support for Training and Career Development of Researchers, as set out in Annex 3, Table 3.4 of this work programme. The evaluation, selection and award criteria are set out in Annex 2.

#### ***2.2.2.3. Expected impact of the action***

Projects under this action are expected to contribute significantly to 'brain circulation' at global level and substantially add to the reinforcement of the human research potential in the European Research Area. The projects provide organisations active in research in both the private and public sectors with opportunities to acquire new knowledge and experience gained by researchers during their mobility experience outside Europe. At the same time these researchers bring with them a network of beneficial future international research collaborations. The return and reintegration phase also adds to these researchers' career development at European level and helps to enhance their employability.

### **2.3 MARIE CURIE ACTION: CO-FUNDING OF REGIONAL, NATIONAL AND INTERNATIONAL PROGRAMMES (COFUND)**

*Call Reference FP7-PEOPLE-2010-COFUND*

#### ***2.3.1. Introduction and objective of the action***

This action aims at increasing the European-wide mobility possibilities for training and career development of *experienced researchers*, in line with the objectives set out in the activity heading 'Life-long training and career development', thus boosting its overall impact. The co-funding action targets programmes that support the trans-national mobility of *experienced researchers* at different stages of their careers, including researchers shortly after having obtained a doctorate, by broadening or deepening their individual competence, in particular in terms of acquisition of multi- or interdisciplinary skills or having intersectoral experiences; to support researchers in attaining and/or strengthening a leading independent position, e.g. principal investigator, professor or other senior position in education or enterprise; (re)integrate researchers into a research career in Member States and Associated countries, including in their country of origin, after a mobility experience.

Rather than providing the possibility for trans-national experiences only through direct Community actions, the co-funding action aims to encourage existing or new regional or national programmes to open up to and provide for trans-national mobility, as well as to reinforce international programmes.

The co-funding action targets a competitive selection of existing or new regional, national and international funding programmes that focus on the objectives set for this action, based on individual-driven mobility. These programmes must run an open, merit-based competition for the applying researchers, and be founded on international peer-review. While avoiding

limitations regarding the researchers' origin and destination, they should also offer adequate working conditions for the final beneficiaries. These requirements should be in line with the principles set out in the European Charter for researchers and Code of conduct for the recruitment of researchers<sup>11</sup>. In particular, given their level of experience, the researchers funded under the programme are expected, as a general rule, to be offered regular employment contracts complying with the social security legislation applicable<sup>12</sup>. When an employment contract is not provided by the applicant programme, then this should be duly justified, and the longer-term perspectives for a change be presented.

### **2.3.2. Technical content/scope**

**Participants:** Participants in the co-funding modality must be established in Member States or Associated Countries and are organisations falling under one of the following categories:

- Public bodies, as defined in Article 2.13 of the Rules for Participation<sup>13</sup>, responsible for funding and managing fellowship programmes, e.g. ministries, state committees for research, research academies, councils or agencies;
- Other bodies, including *research organisations*, that finance and manage fellowship programmes either with an official mandate or recognised by public authorities, such as agencies established by governments under private law with a public service mission, charities, etc.;
- International organisations as defined in Article 2.10 and 11 of the Rules for Participation<sup>13</sup> that run comparable schemes at European level as part of their mission.

**Programmes:** Participants will submit multi-annual proposals for new or existing regional, national or international programmes to be co-funded. The evaluation will be organised in two different Panels:

- Panel A) Existing transnational fellowship programmes (including national programmes opening for first time for transnational mobility).
- Panel B) New fellowship programmes with transnational mobility.

The proposal should demonstrate that the programme or programmes (to be) managed by the participant fund(s) individual research training/career development fellowships for the target group of *experienced researchers* addressed under the activity heading 'Life-long training and career development'. The programmes supported should have regular selection rounds for these category of researchers based on open, widely advertised competition, with transparent international peer review and selection of candidates on merits.

The proposal should contain a clear plan on how the openness of the programme, the transnational mobility and the working conditions of the final beneficiaries will be realised and/or enhanced. The Community contribution for existing schemes should not substitute or replace existing funding but contribute to an increased level of transnational fellowships or the amelioration of working/employment conditions. This should be adequately reflected in the proposal and will be a central issue of the evaluation process.

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<sup>11</sup> Commission recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers, C(2005) 576 of 11.3.2005.

<sup>12</sup> see Council Regulation (EC) N° 1408/71 of 14 June 1971 (N.B. Council Regulation (EC) N° 1408/71 of 14 June 1971 will be repealed in March 2010 by Regulation (EC) No 883/2004 of the European Parliament and of the Council of 29 April 2004).

<sup>13</sup> EC FP7 Rules for Participation.

The action takes into account three types of trans-national mobility, on which the support under this action is essentially based:

- (1) **Outgoing mobility** for fellowships/grants to residents of Member States or Associated countries, preferably with a return phase,
- (2) **Incoming mobility** for fellowships/grants to non-residents of the country of the host organisation;
- (3) **Re-integration** of Member State or Associated country nationals having carried out research in a *third country* for at least 3 years, to establish them in a longer-term career after this trans-national mobility period.

The reference for the methods of selection of the final beneficiaries and their working conditions provided for under the programme are those laid down in the Commission Recommendation on the European Charter for Researchers and a Code of Conduct for their Recruitment<sup>14</sup>. In establishing the mobility rules and during the selection process of researchers, the co-funded programmes must ensure that all selected researchers will demonstrate genuine mobility with a significant benefit for the European Research Area.

Selected programmes under the co-funding actions are required to brand the eligible fellowships awarded “Co-funded by Marie Curie Actions”, and advertise their calls internationally, including at the Commission dedicated web-sites.

**Eligible researchers under the co-funded programmes:** To be eligible, researchers supported under the programmes co-funded in the frame of this action must comply with the definition of *experienced researchers* and of trans-national mobility mentioned above. If the hosting organisation of the researchers is an international European interest organisation or international organisation located in any of the Member States or Associated countries, the compliance with trans-national mobility rules is not required.

#### **Community Contribution, Rates and Evaluation Criteria:**

The Community contribution is fixed at 40% of the fellowship costs for eligible researchers, with a maximum overall of EUR 5 million to a single applicant entity<sup>15</sup> for one call.

This contribution will take the form of reimbursement of scale of unit costs. The scale of unit contribution consists of a fixed amount per fellow-year, determined for each proposed fellowship scheme at the negotiation stage, based on evidence of the expected average costs, which will be confirmed by a separate Commission Decision. In establishing these contributions, a ceiling of 7% for management costs and 10% for overheads cannot be exceeded for any programme. The requested Community contribution for each programme

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<sup>14</sup> Commission recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers, C(2005) 576 of 11.3.2005.

<sup>15</sup> However, in accordance with the Decisions concerning the Seventh Framework Programme (OJ L 412, 30.12.2006, p. 1 Decision No 1982/2006/EC of the European Parliament and of the Council of 18 December 2006) and the 'People' Specific Programme (OJ L 54, 22.02.2007), the provisions of Article 120 (2) of the Council Regulation on the Financial Regulation applicable to the general budget of the European Communities (OJ L 248, 16.09.2002, p.1; Regulation as amended by Regulation (EC, Euratom) No 1995/2006 (OJ L 390, 30.12.2006, p.1)) and Article 184a of the Commission Regulation laying down detailed rules for the implementation of Council Regulation on the Financial Regulation applicable to the general budget of the European Communities (OJ L 357, 31.12.2002, p.1; Regulation as last amended by Regulation (EC, Euratom) No 478/2007 (OJ L 111/13)), shall not be applicable with regard to the financial support provided by the participants in the Co-funding action to third parties participating in fellowships selected following calls for proposals launched under this action.

and fellowship type will be the fixed-amount contribution multiplied by the number of fellowship-years.

Participants having benefited from co-funding under previous calls must explain in their proposals how the latest proposal relates to the earlier grant, and justify the re-application in terms of feasibility, management capacity and additional value.

The evaluation, selection and award criteria are set out in Annex 2 of this Work Programme.

### ***2.3.3. Expected impact of the action***

The co-funding action will on a voluntary basis **exploit synergies between Community actions and those at regional and national level**, as well as with other actions at international level. The structuring effect and impact of the co-funding mode would be through its leverage effect on regional, national or international funding programmes that focus on the objective set up for the “life-long training and career development”, based on individual-driven mobility. This impact is expected to extend to:

- (1) **Enabling** the relevant regional, national and international actors to contribute significantly to the development within their own setting of high quality human resources, by **introducing and/or further developing the trans-national dimension** of their offers, both in terms of **incoming mobility** (of either researchers from countries other than that of the programme, or of the **return and reintegration** of nationals currently abroad), as well in terms of **outgoing mobility** of researchers to another country.
- (2) **Increasing the numerical and/or qualitative impact**, in terms of supported researchers or working/employment conditions.
- (3) **Combating fragmentation** in terms of objectives, evaluation methods and working conditions of regional, national or international offers in this area

### **Activity 3: Industry-Academia Partnerships and Pathways**

There is no call for this action envisaged in the 2010 work programme. It should be recalled however, that the call in the 2009 work programme closed on 27 July 2009 with grant agreements being issued from January 2010 onwards. A further call is expected to be published in Autumn 2010 subject to the adoption of the 2011 work programme.

## Activity 4: World Fellowships

### 4.1 MARIE CURIE ACTION: INTERNATIONAL OUTGOING FELLOWSHIPS FOR CAREER DEVELOPMENT (IOF)

*Call Reference FP7-PEOPLE-2010-IOF*

#### 4.1.1. Introduction and objective of the action

This action aims to reinforce the international dimension of the career of European researchers by giving them the opportunity to be trained and acquire new knowledge in a high-level organisation active in research, established in a *third country*. Subsequently, these researchers will return with the acquired knowledge and experience to an organisation in a Member State or Associated country.

#### 4.1.2. Technical content/scope

**Projects and participants:** This action consists of financial support to individual mobility projects presented by *experienced researchers* in liaison with host organisations in the Member States or Associated countries. The grant agreements will be concluded with the return host organisations of the Member States or the Associated countries for a total duration of up to three years. It is mandatory for the project to include a coherent research programme for the total duration of the contract, of which an initial outgoing phase, of between one and two years, is to be spent in a distinct legal entity in a *third country* (partner organisation) and a mandatory re/integration phase of one year within the contracting organisation (return host organisation) in a Member State or Associated country. The reintegration phase will normally commence directly after the outgoing phase.

The research topic will be freely chosen by the researcher in collaboration with the return host organisation, with a view to completing and/or diversifying her/his expertise.

Each researcher will establish, together with her/his personal supervisor in the return host organisation, a Personal Career Development Plan comprising his/her training needs (including complementary skills) and scientific objectives and later report on the success with which these objectives were met. In this way the researchers will be encouraged to play an active role in shaping their own training programme and professional development.

**Eligible researchers:** Researchers shall be considered eligible under this action if they are nationals of a Member State or Associated country, and fulfil the requirements for being qualified as *experienced researchers*, at the time of the relevant deadline for submission of proposals. As the action is directed at life-long training and career development, it is however expected that the researchers will typically have a more senior profile in terms of experience .

The researchers shall be selected by the Commission on the basis of a proposal submitted in liaison with a return host organisation in a Member State or an Associated country. The researchers will be in a situation of secondment during the initial phase of training in the partner organisation in the *third country*.

**Rules of mobility applicable to eligible researchers:** For the outgoing phase, applicants must demonstrate mobility from a Member State or Associated country to a *third country*, and must comply with the rule for *mobility* at the deadline for submission of proposals. The benefit of the proposed mobility will also be assessed during evaluation in terms of benefit for the ERA.

**Community Contribution, Rates and Evaluation Criteria:** The Community rates are those for the funding scheme Support for Training and Career Development of Researchers, as set

out in Annex 3 of this work programme. The evaluation, selection and award criteria are set out in Annex 2.

#### **4.1.3. Expected impact of the action**

The projects under this action are to contribute to significant steps/changes in the careers of the best and most promising European researchers, specifically adding different and/or complementary research competences at an advanced level, in the process of reaching and/or reinforcing a position of professional maturity, by exposing them to a research training experience outside Europe. Projects are expected to add significantly to the career development of European researchers, while by means of the return phase their experience and knowledge acquired as well as the contact-network built up outside Europe is used to the benefit of the development of the European knowledge-based economy and society.

## **4.2 MARIE CURIE ACTION: INTERNATIONAL INCOMING FELLOWSHIPS (IIF)**

Call Reference FP7-PEOPLE-2010-IIF

#### **4.2.1. Introduction and objective of the action**

This action aims to reinforce the scientific excellence of the Member States and the Associated countries through knowledge sharing with incoming top-class researchers active in a *third country* to work on research projects in Europe, with the view to developing mutually-beneficial research co-operation between Europe and a *third country*. It aims to encourage these researchers to plan their period of international mobility within the framework of a coherent professional project and thus enhances the possibility of future collaborative research links with European researchers and organisations active in research in their future research career.

If before the incoming phase the researcher was active in one of the International Cooperation Partner Countries (see Annex 1), the possibility is provided to assist the researcher to return to this country, thus contributing to the establishment of sustainable cooperation between these countries and European organisations.

#### **4.2.2. Technical content/scope**

**Projects and participants:** The action provides financial support to individual research projects presented by the incoming *experienced researchers* in liaison with a legal entity ('host organisation') in a Member State or an Associated country, as well as possibly a 'return host organisation' if the researcher was active in an International Cooperation Partner Country (see list of countries in Annex 1) before the incoming phase.

The research topic will be freely chosen by the researcher in collaboration with the host organisation.

The researchers shall be selected by the Commission on the basis of a proposal submitted in liaison with a host organisation in a Member State or Associated country.

#### *Incoming Phase:*

The grant agreement will be concluded with the host organisations of the Member States or the Associated countries for a total duration of between one and two years.

### *Possible Return Phase for researchers from International Cooperation Partnership Countries (ICPC):*

For a possible return phase to an ICPC, a grant agreement will be issued for the duration of one year with the return host organisation, which will commit itself to ensure an effective return of the researcher. The grant is to be used as a contribution to scientific costs relating to the researcher's project at the return host.

The ranking list(s) for IIF proposals will be drawn up solely on the evaluation scoring of the incoming phase. The proposal will include a description of the return phase in an identified return host organisation; however selection for the return phase will depend on that of the incoming phase, which is considered to demonstrate the necessary quality of the researcher. During the evaluation, the evaluators will be asked to provide comments for the negotiation of the grant agreements with the return host, which will be taken into account by the Commission for the finalisation of the grant agreement.

The return phase will normally commence not later than 6 months after the termination of the incoming phase.

**Eligible researchers:** Researchers shall be considered eligible under this action if, at the time of the relevant deadline for submission of proposals, they fulfil the requirements for being qualified as *experienced researchers*. It is however expected that the researchers will typically have a more senior profile in terms of experience.

**Rules of mobility and nationality applicable to eligible researchers:** Applicants can be of any nationality. They must demonstrate mobility from a *third country* to a Member State or Associated country, and must comply with the rule for *mobility* at the deadline for submission of proposals. The benefit of the proposed mobility will also be assessed during evaluation in terms of benefit for the ERA.

**Community Contribution, Rates and Evaluation Criteria:** The Community rates are those for the funding scheme Support for Training and Career Development of Researchers, as set out in Annex 3 of this work programme. The evaluation, selection and award criteria are set out in Annex 2.

#### **4.2.3. Expected impact of the action**

Projects under this action will add to the research excellence in both the public and private sectors in Member States and Associated countries, due to the sharing and application of new knowledge transferred and developed by highly qualified researchers embedded in the European research effort. At the same time the projects will constitute nuclei for future research relations at international level, which will be beneficial in the context of the development of the European knowledge-based economy and society.

### **4.3 MARIE CURIE ACTION: INTERNATIONAL RESEARCH STAFF EXCHANGE SCHEME (IRSES)**

#### *Call Reference FP7-PEOPLE-2010-IRSES*

##### **4.3.1 Introduction and objective of the action**

The Marie Curie International Staff Exchange Scheme is a new type of action first implemented in 2008, that aims to strengthen research partnerships through staff exchanges and networking activities between European *research organisations* and *research organisations* from countries with which the Community has an S&T agreement or are in the

process of negotiating one<sup>16</sup>, and countries covered by the European Neighbourhood policy. Compared to existing Marie Curie actions, which provide mobility possibilities to individual researchers, this new action will provide support to *research organisations* to establish or reinforce long-term research cooperation through a coordinated joint programme of exchange of researchers for short periods.

#### **4.3.2 Technical content/scope**

**Participants:** A participant in this action is a *research organisation* that will be a member of the partnership that contributes directly to the implementation of the joint exchange programme, by seconding and/or hosting eligible researchers.

A partnership in this action shall be composed of at least two independent participants established in at least two different Member States or Associated countries, and one or more organisations either located in countries with which the Community has an S&T agreement or are in the process of negotiations, or in countries covered by the European Neighbourhood Policy.

#### **Eligible programmes and eligible staff**

Participants will submit to the Commission multi-annual proposals for joint programmes for short exchanges of research staff. Technical and management staff may however, also participate in the exchanges.

Financial support will be provided for a period of 24 to 48 months, to joint programmes aiming at trans-national mobility of researchers, technical and management staff. For organisations in Member States and Associated countries, the mobility must be towards the *third country* partners, and vice-versa. The duration of exchanges for each researcher or technical/management staff will be for a maximum of 12 months.

The staff to be exchanged should be 'seconded' (i.e. maintain their salary in their institution of origin, and have the right to return), so as to guarantee full re-integration and the positive recognition of the mobility experience, thus maximising the benefit of this action for long term cooperation.

The grant agreement will be concluded with the participants located in the Member State or Associated country, while the other members of the partnership are defined as partner organisations.

The size of the joint programme and of the partnership will depend on the number of expected researchers, technical and management staff to be exchanged.

#### **Community Contribution and evaluation criteria**

In principle, the scheme is intended to provide a balanced exchange of researchers between the European partners and the *third country* partner organisations, each respectively funding the mobility costs of their 'outgoing' researchers.

The fixed Community contribution is 1900 EUR per exchanged staff member per month. This amount should cover the cost of travel and subsistence of the exchanged staff. Networking actions, management costs and overheads related to the execution of the exchange may also be included in the contribution. For countries located a long distance from Europe (see list of eligible countries in Annex 1.3), an additional long distance allowance of 200 EUR per exchanged staff member per month is paid to cover their higher travel costs.

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<sup>16</sup> See ANNEX I to this work programme for countries eligible for the IRSES scheme.

For International Cooperation Partnership Countries (these include all countries covered by the European Neighbourhood policy), an identical Community contribution will be provided if requested. The evaluation, selection and award criteria are set out in Annex 2.

#### ***4.3.3 Expected impact***

Projects under this action are expected to contribute significantly to constructing new and enhancing existing networks of beneficial international research collaborations between Member States and Associated countries and those *third countries* covered by the Science and Technology agreement or by the European Neighbourhood Policy. At the same time the participants bring with them knowledge encouraging an exchange of best practice.

### **Activity 5: Specific Actions**

#### **5.1 RESEARCHERS' NIGHT (NIGHT)**

##### *Call Reference FP7-PEOPLE-2010-NIGHT*

##### ***5.1.1. Introduction and objective of the action***

This action aims to bring the researchers closer to the public at large, so enhancing their role in the mainstream of society. The increasing success and impact of this annual event since 2005 both in terms of number of people reached and the benefits to the Marie Curie programme justifies its annual frequency. The format of the call for proposals, which was applied for the first time in 2006, allows for a greater cohesion between the various actions supported, their scale, the target audience and the messages delivered.

##### ***5.1.2. Technical content/scope***

**Projects and participants:** The Researchers NIGHT will take place on Friday, 24 September 2010, and will be the next occasion for a European wide public and media event for the promotion of research careers. It is intended to ensure as large a geographical coverage as possible, involving the maximum number of Member States and Associated countries. Participants can be any legal entity in the Member States and Associated countries, and/or if relevant, constituting a partnership at regional, national or international level. Preference should be given to those projects within which a regional, local or national financial involvement exists (without excluding those requesting 100% funding). Activities organised will have to be focused on the public at large, and be organised with researchers being actively involved and directly in contact with the public.

**Community Contribution, Rates and Evaluation Criteria:** The grant will cover a period of up to seven months (covering the necessary awareness campaign, the activities during the night itself and the impact assessment period). Eligible costs will be those necessary for the completion of the action. Applicants are expected to include in their proposals any costs they may incur relating to the promotion of the European dimension of their events. The Community contribution rates for this action are based on the Coordination and support action funding scheme and the evaluation criteria are set out in Note 2 of Annex 2. Preference will be given to proposals that have a well developed and well described European dimension of the proposed events.

##### ***5.1.3. Expected impact of the action***

The expected impact of this action consists of continuing to tackle the existing stereotypes about researchers and the profession, and to have the public at large better understand the central role of scientists and the key benefits they bring to society. The action should demonstrably reinforce the trend for increasing public participation in the Researchers' Night. An additional impact should be to convince young people that scientific careers are fascinating and to stimulate them to embark on scientific careers with mobility.

### III IMPLEMENTATION OF CALLS

#### THE 2010 MARIE CURIE ACTIONS ROADMAP

(Listed by closing dates)

Action	Call ID	Call Opens	Call Deadline/ Cut-off dates
ITN Initial Training Networks	FP7-PEOPLE-2010-ITN	8 September 2009	<b>22 December 2009</b>
NIGHT Researchers' Night	FP7-PEOPLE-2010-NIGHT	13 October 2009	<b>13 January 2010</b>
COFUND Co-funding of Regional, National & International Programmes	FP7-PEOPLE-2010 - COFUND	18 November 2009	<b>18 February 2010</b>
IRSES International Research Staff Exchange Scheme	FP7-PEOPLE-2010-IRSES	25 November 2009	<b>25 March 2010</b>
RG Reintegration Grants (ERG & IRG schemes) 1st cut off	FP7-PEOPLE-2010-RG	09 October 2009	<b>9 March 2010</b>
IEF Intra-European Fellowships	FP7-PEOPLE-2010-IEF	17 March 2010	<b>17 August 2010</b>
IIF International Incoming Fellowships	FP7-PEOPLE-2010-IIF	17 March 2010	<b>17 August 2010</b>
IOF International Outgoing Fellowship	FP7-PEOPLE-2010-IOF	17 March 2010	<b>17 August 2010</b>
RG Reintegration Grants (ERG & IRG grants) 2nd cut off	FP7-PEOPLE-2010-RG	09 October 2009	<b>7 September 2010</b>

#### Activity 1: Initial Training of Researchers

##### CALL TITLE: MARIE CURIE INITIAL TRAINING NETWORKS (ITN)

- **Call identifier:** *FP7-PEOPLE-2010-ITN*
- **Date of publication:** 08 September 2009<sup>17</sup>
- **Deadline:** 22 December 2009 at 17:00:00, Brussels local time<sup>18</sup>
- **Indicative budget:** *EUR 243.79 million* of the 2010 budget<sup>19</sup>. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

ACTION	Funding Schemes
<i>Marie Curie Initial Training Networks</i>	<i>Support for training and career development of researchers</i>

- **Eligibility conditions**

- The general eligibility criteria are set out in Annex 2 of this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.

<sup>17</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication

<sup>18</sup> The Director-General responsible may delay this deadline by up to two months

<sup>19</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority

- This action addresses joint research training networks in the form of either multi- or mono-partner ITNs. The number of participating legal entities required in this action is summarised in the table below. For further details concerning these conditions, as well as the additional criteria relating to the eligibility of researchers recruited under an ITN project, you must refer to the core text of the work programme.

Type	Conditions
Multi-partner ITN	At least three participants established in at least three different Member States or Associated countries. Above this minimum, the participation of " <i>third countries</i> " and of international organisations is foreseen under the conditions provided by the Rules for Participation <sup>4</sup>
Mono-partner ITN	Mono-partner ITNs include a single participant and a network of associated partners. The single participant shall be established in a Member State or Associated country.

- **Evaluation procedure:**

- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 of this work programme.
- Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).
- Associated partners must include a letter of commitment in the proposal to ensure their real and active participation in the proposed network. The experts will be instructed to disregard the contribution of any associated partners for which no such evidence of commitment is submitted.
- A single-stage submission and evaluation procedure will be used.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- The procedure for prioritising proposals with equal scores is described in annex 2 of this work programme.
- Proposals are allocated to one of 8 scientific panels<sup>20</sup>. For each panel a ranked list is established. The distribution of the indicative budget of the call over the

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<sup>20</sup> The Marie Curie scientific panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**.

scientific disciplines will be proportional to the number of eligible proposals received in each panel. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated<sup>21</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.

- **Indicative evaluation and contractual timetable:**
  - Evaluation results are estimated to be available 4 months after the relevant deadline for submission.
  - Grant agreement signature: expected from within 9 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.
- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of this work programme.

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## Activity 2: Life-long Training and Career Development

### CALL TITLE: MARIE CURIE INTRA-EUROPEAN FELLOWSHIPS FOR CAREER DEVELOPMENT (IEF)

- **Call identifier:** *FP7-PEOPLE-2010-IEF*
- **Date of publication:** 17 March 2010<sup>17</sup>
- **Deadline:** 17 August 2010 at 17.00.00, Brussels local time<sup>18</sup>
- **Indicative budget:** *EUR 95 million* of the 2010 budget<sup>19</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

ACTION	Funding Schemes
<i>Marie Curie Intra-European Fellowships for Career Development</i>	<i>Support for training and career development of researchers</i>

- **Eligibility conditions**
  - The general eligibility criteria are set out in Annex 2 of this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
  - This action addresses researchers who, at the time of the relevant deadline for submission of proposals, correspond to the definition of "*experienced researchers*", and who comply with the "*mobility*" rule. They must demonstrate

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<sup>21</sup> Measured as proposals having passed all relevant evaluation thresholds.

<sup>17</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>18</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>19</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority.

mobility from a Member State or Associated country to another Member State or Associated country. In addition, researchers applying for the 'career restart panel' must, at the time of the relevant deadline for submission of proposals, not have been active on a fellowship, or employed under contract in research for at least 12 months. Applicant host organisations must be active in research and located in a Member State or Associated country. Projects must be for a period of 12 – 24 months. The application is made jointly by a researcher and a host organisation. For further details concerning these conditions you must refer to the core text of the work programme.

- **Evaluation procedure:**

- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 of this work programme.
- Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).
- A single-stage submission and evaluation procedure will be used.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- The procedure for prioritising proposals with equal scores is described in annex 2 of this work programme.
- Proposals are allocated to one of 9 panels: 8 scientific panels<sup>20</sup>, and one multi-disciplinary career restart panel. For each panel a ranked list is established. The distribution of the indicative budget of the call over the panels will be proportional to the number of eligible proposals received in each panel. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated<sup>21</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.

- **Indicative evaluation and contractual timetable:**

- Evaluation results are estimated to be available within some 4 months after the relevant deadline for submission.
- Grant agreement signature: expected from within 6 months after the relevant deadline for submission.

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<sup>20</sup> The Marie Curie scientific panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**.

<sup>21</sup> Measured as proposals having passed all relevant evaluation thresholds.

- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of this work programme.

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**CALL TITLE: MARIE CURIE RE-INTEGRATION GRANTS (RG)**

- **Call identifier:** *FP7-PEOPLE-2010-RG*
- **Date of publication:** 09 October 2009<sup>17</sup>
- **Deadline:** Continuous submission with 'cut-off dates' for evaluation of proposals received until then on 9 March 2010 and 7 September 2010, for both dates at 17.00.00, Brussels local time<sup>18</sup>.
- **Indicative budget:** *EUR 32 million of the 2010 budget<sup>19</sup> (of which approximately 1/2 for each evaluation round following the cut-off dates).* The final budget awarded to this call, following the evaluation, may vary up to 10% of the total value of this call.
- **Topics called:**

<b>ACTION</b>	<b>Funding Schemes</b>
<i>Marie Curie European Re-integration Grants (ERG)</i>	<i>Support for training and career development of researchers</i>
<i>Marie Curie International Re-integration Grants (IRG)</i>	<i>Support for training and career development of researchers</i>

- **Eligibility conditions**
  - The general eligibility criteria are set out in Annex 2 of this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
  - The application is made jointly by a researcher and a host organisation. Applicant host organisations must be active in research and located in a Member State or Associated country. These actions address researchers who, at the relevant cut-off date, correspond to the definition of "*experienced researchers*".
  - For ERG: The researcher must be benefiting at the time of application or have previously benefited from a training and mobility action under the 7th or one of the previous Framework Programmes<sup>20</sup> of at least 18 months full-time equivalent. Applications will have to be submitted at the earliest one year before the end of the initial Marie Curie fellowship and not later than six months following its end. Projects must be between 24 and 36 months.

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<sup>17</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>18</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>19</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority.

<sup>20</sup> FP 6 *Marie Curie Actions* eligible in this context are: *Marie Curie Research Training Networks*; *Marie Curie Host Fellowships for Early Stage Research Training (EST)*; *Marie Curie Host Fellowships for the Transfer of Knowledge (ToK)*; *Marie Curie Intra-European Fellowships*, *Marie Curie Excellence Grants (EXT)*. FP7 *Marie Curie Actions* eligible in this context are: *Initial Training Networks (ITN)*; *Intra-European Fellowships for Career Development (IEF)*; *International Incoming fellowship (IIF)*, *Industry-Academia Partnerships and Pathways (IAPP)*.

- For IRG: The researcher must - at the relevant cut-off date - be a national of a Member State or Associated country, and have been active in research in a "*third country*" for at least 3 years full-time equivalent. In addition, the researcher must not have spent more than 12 months in a Member State or Associated country during the three years prior to the cut-off date. Projects must be between 24 and 48 months.
- For further details concerning these conditions you must refer to the core text of the work programme.
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 of this work programme.
  - Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
  - The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).
  - A single-stage submission and evaluation procedure will be used.
  - Proposals will not be evaluated anonymously.
  - Proposals will be evaluated on a continuous basis and selected on an individual basis. Proposals may be evaluated remotely.
  - The procedure for prioritising proposals with equal scores is described in annex 2 of this work programme.
  - Applications for the ERG and IRG schemes are allocated to one of 2 panels: ERG 'European reintegration grants' and IRG 'International reintegration grants'. The distribution of the indicative budget of the call between the 2 panels will be in proportion to the requested Community contribution of the eligible proposals received for each scheme. For each panel a ranked list is established. If the budget allocated to one of the panels exceeds the requirements of all proposals positively evaluated<sup>21</sup> in that panel, the excess budget will be transferred to the other panel. Equally, if the allocated funding to one panel is insufficient to fund the highest ranked proposal in that panel, necessary budget will be transferred from the other panel in order to ensure that the highest ranked proposal can be funded.
- **Indicative evaluation and contractual timetable:**
  - Evaluation results are estimated to be available within 4 months following the relevant cut-off date.
  - Grant agreement signature: expected from 6 months after the relevant cut-off date.

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<sup>21</sup> Measured as proposals having passed all relevant evaluation thresholds

- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of this work programme.

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**CALL TITLE: MARIE CURIE CO-FUNDING OF REGIONAL, NATIONAL AND INTERNATIONAL PROGRAMMES (COFUND)**

*Call Reference FP7-PEOPLE-2010-COFUND*

- **Date of publication:** 18 November 2009<sup>17</sup>
- **Deadline:** 18 February 2010 at 17.00.00, Brussels local time<sup>18</sup>
- **Indicative budget:** EUR 75 million of the 2010 budget<sup>19</sup>. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

<b>ACTION</b>	<b>Funding Schemes</b>
<i>Marie Curie Co-funding of Regional, National, and International Programmes</i>	<i>Support for training and career development of researchers</i>

- **Eligibility conditions**

- The general eligibility criteria are set out in Annex 2 of this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
- The application is made by a single organisation responsible for one or more fellowship programmes. Applicant organisations must be established in a Member State or Associated Country and must fall into one of the following categories:
  - Public bodies, as defined in Article 2.13 of the Rules for Participation<sup>20</sup>, responsible for funding and managing fellowship programmes, e.g. ministries, state committees for research, research academies, councils or agencies;
  - Other bodies, including *research organisations*, that finance and manage fellowship programmes either with an official mandate or recognised by public authorities, such as agencies established by governments under private law with a public service mission, charities, etc.;
  - International organisations as defined in Article 2.10 and 11 of Rules for Participation<sup>20</sup> that run comparable schemes at European level as part of their mission.

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<sup>17</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>18</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>19</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority.

<sup>20</sup> EC FP7 Rules for Participation

- For further details concerning these conditions you must refer to the core text of the work programme.
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 of this work programme.
  - Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
  - The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).
  - A single-stage submission and evaluation procedure will be used.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.
  - The procedure for prioritising proposals with equal scores is described in annex 2 of this work programme.
  - Proposals are allocated to one of 2 panels: (A) 'Existing trans-national fellowship programmes' and (B) 'New fellowship programmes with transnational mobility'. The distribution of the indicative budget of the call between the 2 panels will be proportional to the requested Community contribution of the proposals positively evaluated. For each panel a ranked list is established. If the budget allocated to one of the panels exceeds the requirements of all proposals positively evaluated<sup>21</sup> in that panel, the excess budget will be transferred to the other panel. Equally, if the allocated funding to one panel is insufficient to fund the highest ranked proposal in that panel, necessary budget will be transferred from the other panel in order to ensure that the highest ranked proposal can be funded.
- **Indicative evaluation and contractual timetable:**
  - Evaluation results are estimated to be available within 4 months following the relevant deadline for submission.
  - Grant agreement signature: expected from within 6 months after the relevant deadline for submission.

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### **Activity 3: Industry-Academia Partnerships and Pathways**

#### **MARIE CURIE INDUSTRY-ACADEMIA PARTNERSHIPS AND PATHWAYS (IAPP)**

There is no call envisaged in this work programme. The intention is to adopt the 2011 work programme in mid-2010 and publish calls as early as possible thereafter.

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<sup>21</sup> Measured as proposals having passed all relevant evaluation thresholds.

## Activity 4: World Fellowships

### CALL TITLE: MARIE CURIE INTERNATIONAL OUTGOING FELLOWSHIPS FOR CAREER DEVELOPMENT (IOF)

- **Call identifier:** *FP7-PEOPLE-2010-IOF*
- **Date of publication:** 17 March 2010<sup>17</sup>
- **Deadline:** 17 August 2010 at 17.00.00, Brussels local time<sup>18</sup>
- **Indicative budget:** *EUR 28 million* of the 2010 budget<sup>19</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

ACTION	Funding Schemes
<i>Marie Curie International Outgoing Fellowships for Career Development</i>	<i>Support for training and career development of researchers</i>

- **Eligibility conditions**
  - The general eligibility criteria are set out in Annex 2 of this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
  - The application is made jointly by a researcher and a return host organisation.
  - The action addresses researchers who, at the time of the relevant deadline for submission of proposals, correspond to the definition of "*experienced researchers*" and comply with the "*mobility*" rule, and who are nationals of a Member State or Associated country. They must demonstrate mobility from a Member State or Associated country to a "*third country*".
  - The outgoing host organisation must be located in a "*third country*", and the return host organisation in a Member State or Associated country.
  - Projects must be between 24 and 36 months in total, of which the final 12 months must be a mandatory re-integration phase to the return host organisation.
  - For further details concerning these conditions you must refer to the core text of the work programme.
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 of this work programme.
  - Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.

<sup>17</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>18</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>19</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority.

- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).
  - A single-stage submission and evaluation procedure will be used.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.
  - The procedure for prioritising proposals with equal scores is described in annex 2 of this work programme.
  - Proposals are allocated to one of 8 scientific panels<sup>20</sup>. For each panel a ranked list is established. The distribution of the indicative budget of the call over the scientific disciplines will be proportional to the number of eligible proposals received in each panel. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated<sup>21</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.
  - **Indicative evaluation and contractual timetable:**
    - Evaluation results are estimated to be available within some 4 months after the relevant deadline for submission.
    - Grant agreement signature: expected from within 6 months after the relevant deadline for submission.
  - **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of this work programme.
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<sup>20</sup> The Marie Curie scientific panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**.

<sup>21</sup> Measured as proposals having passed all relevant evaluation thresholds

**CALL TITLE: MARIE CURIE INTERNATIONAL INCOMING FELLOWSHIPS (IIF)**

- **Call identifier:** *FP7-PEOPLE-2010-IIF*
- **Date of publication:** 17 March 2010<sup>17</sup>
- **Deadline:** 17 August 2010 at 17.00.00, Brussels local time<sup>18</sup>
- **Indicative budget:** *EUR 28 million* of the 2010 budget<sup>19</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

ACTION	Funding Schemes
<i>Marie Curie International Incoming Fellowships</i>	<i>Support for training and career development of researchers</i>

- **Eligibility conditions**
  - The general eligibility criteria are set out in Annex 2 of this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
  - The application is made jointly by a researcher and a host organisation, as well as, where applicable, a return host organisation.
  - The action addresses researchers who, at the time of the relevant deadline for submission of proposals, correspond to the definition of "*experienced researchers*" and comply with the "*mobility*" rule. They must demonstrate mobility from a "*third country*" to a Member State or Associated country.
  - Applicant host organisations must be active in research. For the incoming phase, the host organisation must be located in a Member State or Associated country. For a possible return phase, the return host organisation must be located in an International Cooperation Partner Country (ICPC).
  - Projects must be for a period of between 12 and 24 months. Where relevant, the return phase will be for an additional 12 months.
  - For further details concerning these conditions you must refer to the core text of the work programme.
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 of this work programme.
  - Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.

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<sup>17</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>18</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>19</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority.

- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).
  - A single-stage submission and evaluation procedure will be used.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.
  - The procedure for prioritising proposals with equal scores is described in annex 2 of this work programme.
  - Proposals are allocated to one of 8 scientific panels<sup>20</sup>. For each panel a ranked list is established. The distribution of the indicative budget of the call over the scientific disciplines will be proportional to the number of eligible proposals received in each panel. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated<sup>21</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.
  - **Indicative evaluation and contractual timetable:**
    - Evaluation results are estimated to be available within some 4 months after the relevant deadline for submission.
    - Grant agreement signature: expected from within 6 months after the relevant deadline for submission.
  - **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of this work programme.
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<sup>20</sup> The Marie Curie scientific panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**.

<sup>21</sup> Measured as proposals having passed all relevant evaluation thresholds.

**CALL TITLE: MARIE CURIE INTERNATIONAL RESEARCH STAFF EXCHANGE SCHEME (IRSES)**

- **Call identifier:** *FP7-PEOPLE-2010-IRSES*
- **Date of publication:** 25 November 2009<sup>17</sup>
- **Deadline:** 25 March 2010 at 17.00.00, Brussels local time<sup>18</sup>
- **Indicative budget:** *EUR 30 million* of the 2010 budget<sup>19</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

<b>ACTION</b>	<b>Funding Schemes</b>
<i>Marie Curie International Research Staff Exchange Scheme</i>	<i>Support for training and career development of researchers</i>

- **Eligibility conditions**
  - The general eligibility criteria are set out in Annex 2 of this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
  - This action addresses partnership composed of at least two independent "*research organisations*" established in at least two different Member States or Associated countries, and one or more "*research organisation*"s either located in countries with which the Community has an S&T agreement or are in the process of negotiations, or in countries covered by the European Neighbourhood Policy.
  - For further details concerning these conditions you must refer to the core text of the work programme.
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 of this work programme.
  - Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
  - The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).
  - A single-stage submission and evaluation procedure will be used.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.

<sup>17</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>18</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>19</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority.

- The procedure for prioritising proposals with equal scores is described in annex 2 of this work programme.
- Proposals will be evaluated in a single multi-disciplinary panel and there will be a single ranked list.
- **Indicative evaluation and contractual timetable:**
  - Evaluation results are estimated to be available within some 6 months after the relevant deadline for submission.
  - Grant agreement signature: expected from within 9 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.
- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of this work programme.

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## Activity 5: Specific Actions

### CALL TITLE: RESEARCHERS' NIGHT (NIGHT)

- **Call identifier:** *FP7-PEOPLE-2010-NIGHT*
- **Date of publication:** 13 October 2009<sup>17</sup>
- **Deadline:** 13 January 2010 at 17.00.00, Brussels local time<sup>18</sup>
- **Indicative budget:** *EUR 3.5 million* of the 2010 budget<sup>19</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

ACTION	Funding Schemes
<i>Researchers' Night 2010</i>	<i>Coordination and support actions (support)</i>

- **Eligibility conditions**
  - The general eligibility criteria are set out in Annex 2 of this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
  - This action addresses any legal entity or partnership of entities in the Member States and Associated countries.
  - For further details concerning these conditions you must refer to the core text of the work programme.

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<sup>17</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>18</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>19</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority.

- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 of this work programme.
  - Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
  - The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).
  - A single-stage submission and evaluation procedure will be used.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.
  - Proposals will be selected on an individual basis.
  - The procedure for prioritising proposals with equal scores is described in annex 2 of this work programme.
  - Proposals will be evaluated in a single multi-disciplinary panel and there will be a single ranked list.
- **Indicative evaluation and contractual timetable:**
  - Evaluation results are estimated to be available within 1 month following the deadline for submission.
  - Grant agreement signature: expected from within 4 months after the deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.
- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of this work programme.

## IV OTHER ACTIVITIES FOR 2010

Activities described in this chapter are not implemented through calls for proposals. The different initiatives aim to respond to the objective of reinforcing human resources in research in Europe and of stimulating a culture of mobility and career development. These activities will be implemented by the Commission through the funding scheme Coordination and Support Actions, either: by public procurement, through calls for tender or through a specific contract<sup>22</sup>, or via experts contracts. The implementation method to be used is given in the description for each of the topics below. The essential selection and award criteria are contained in Annex 2, while the upper funding limits are in accordance with those set out in Article 33 of the FP7 Rules for Participation (Annex 3.1).

The work programme 2010 needs to contain policy support for the implementation of the European Partnership for Researchers in the frame of the European Research Area.

The measures to implement the activities will include:

### 4.1 SUPPORT FOR CONTINUED DATA-COLLECTION AND - ANALYSIS CONCERNING MOBILITY PATTERNS AND CAREER PATHS OF RESEARCHERS.

#### Objectives

Improve knowledge of mobility patterns and career paths of researchers in support of the further policy development at European and national level.

#### Implementation

Through framework contracts with a project duration of up to 18 months; indicatively one service contract; procedure to be conducted in the first half of 2010.

Indicative budget EUR 1 500 000<sup>23</sup>

Funding scheme: Coordination and support action - public procurement.

### 4.2 SUPPORT FOR EURAXESS-RESEARCHERS IN MOTION ACTIVITIES<sup>24</sup>

#### Objectives

- To maintain the quality and visibility level of the *EURAXESS Services* Network, including specifically for non-European researchers<sup>25</sup> and to maintain awareness of all *EURAXESS* activities (*Services, Jobs, Rights and Links*).

- To expand the capacity and ease of use of the *EURAXESS Jobs* Portal and to ensure its effective links with the national *EURAXESS* Portals through technical maintenance and further architectural developments, in particular with a view to maintain and enhance the

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<sup>22</sup> Based a framework contracts under Article 88 of the Financial Regulation and Article 117 of the Implementing Rules; or by a grant to an identified beneficiary in the sense of Article 14(a) of the EC FP7 Rules for Participation.

<sup>23</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority.

<sup>24</sup> Activities under the indents 1 and 2 are linked to Activity Heading 5 ("Specific actions" of the Specific programme 'People', while activities under indent 3 are linked to Activity Heading 4 ("World Fellowships") of this Specific programme

<sup>25</sup> Following the results and recommendations of an external feasibility study, the *EURAXESS-Links in Europe* (previous *NERE-LINK*) will not be a separate action but will be under the umbrella of *EURAXESS-Services* responding to the needs of non European researchers in Europe regardless of their nationality.

infrastructure to accommodate the advertisement across Europe and globally of all European researchers' vacancies.

- To further promote the existing networks of European researchers abroad (*EURAXESS Links*) whilst expanding it to other countries and regions in the world in order to provide European researchers abroad with information about and keep them in touch with developments in European research policies and activities.

#### Implementation

Amounting to a total of EUR 2 500 000<sup>26</sup>, the following activities will be implemented:

- EURAXESS Services and EURAXESS cross-cutting activities implemented under framework contracts for projects of one year duration; indicatively two to four service contracts; procedures normally to be conducted in both the first and second half of 2010. The activities will include: preparation of the EURAXESS Conference 2011; continuation of promotion activities with special emphasis on EURAXESS-RIGHTS; implementation of the HR Strategy for researchers; animation activities related to EURAXESS, e.g. workshops and a forum of exchange of good practice.

Indicative budget EUR 1 100 000<sup>26</sup>

- EURAXESS Jobs activities for maintenance and infrastructure developments implemented under framework contracts for projects of one year duration; indicatively two service contracts, procedures normally to be conducted in the first half of 2010.

Indicative budget EUR 600 000<sup>26</sup>

- Continuation of the *EURAXESS Links* activities already launched in the USA, Japan and China and to enlarge the geographical coverage. to be, implemented through framework contracts for projects of a duration of one year and a public tender. Indicatively three to six service contracts; procedures normally to be conducted in the first half of 2010.

Indicative budget EUR 800 000<sup>26</sup>

Funding scheme: Coordination and support action - public procurement.

### **4.3 SUPPORT FOR AN EU PRESIDENCY CONFERENCE**

***Support for an EU presidency conference*** with the objective to take stock of the progress of the European Partnership for Researchers in the light of the foreseen evaluation of its implementation, for which Belgium has informally indicated an interest as part of their early planning for the EU Presidency for the second half of 2010. On the condition that the incoming Belgium Presidency confirms their intentions, this would be implemented through a contract for a single project to the appropriate Belgian authorities (Belgian Federal Science Policy Office, rue de la Science 8, 1000 Brussels); procedures normally to be conducted in the first half of 2010.

Indicative budget EUR 150 000<sup>26</sup>

Funding scheme: Coordination and support action – named beneficiary.

### **4.4 COFUND IMPACT ASSESSMENT**

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<sup>26</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority.

**A review of the COFUND action will be launched in late 2010. The impact of the action will be assessed in relation to that of the other relevant Marie Curie actions, notably the Intra-European Fellowships and Reintegration Grants. This will be within the Monitoring, Evaluation and Impact Assessment framework of DG RTD and the Commission.**

Maximum indicative budget EUR 250 000<sup>26</sup>

*Funding scheme:* Coordination and support action – restricted public procurement.

#### **4.5 EUROPEAN DIMENSION OF THE RESEARCHERS' NIGHT**

##### Objectives

To increase the 'European dimension of the action' and therefore the 'European visibility', simultaneous communication links between the events will be created.

##### Implementation

This activity will be implemented through existing framework contracts. The aim is to create and manage a web site and interface simultaneously handling data stream of multiple Researchers' Night events.

Indicative budget EUR 250 000<sup>26</sup>

*Funding scheme:* Coordination and support action – restricted public procurement.

#### **4.6 APPOINTMENT OF INDEPENDENT EXPERTS**

**In addition** to the above activities, The Commission will appoint independent experts to assist with the evaluations of proposals and the review of indirect actions financed under FP7 and the previous framework programmes, in accordance with Articles 17 and 27 of the Rules for Participation.

Indicative budget EUR 7 710 000<sup>26</sup>

*Funding scheme:* Coordination and support action - experts<sup>27</sup>.

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<sup>27</sup> In accordance with Article 14(c), 17 and 27 (1) of the EC FP7 Rules for Participation.

## SUMMARY – 2010 BUDGET

Actions subject to calls for proposals	Budget 2010 <sup>28</sup> (EUR million)
<b>1. Initial Training of Researchers</b>	
Initial Training Networks (ITN)	243.79
<b>2. Life-long Training and Career Development</b>	
Intra-European Fellowships for Career Development (IEF)	95
<u>Re-Integration Grants</u>	
European Re-integration grants (ERG)	32
International Re-integration grants (IRG)	
Co-funding of Regional, National, and International Programmes (COFUND)	75
<b>4. World Fellowships</b>	
International Outgoing Fellowships for Career Development (IOF)	28
International Incoming Fellowships (IIF)	28
International Research Staff Exchange Scheme (IRSES)	30
<b>5. Specific actions</b>	
Researchers' Night (NIGHT)	3.5
<b>Subtotal</b>	<b>535.29</b>
<b>Actions not subject to open calls for proposals</b>	<b>4.65</b>
<b>Expert and Reviewer Evaluators</b>	<b>7.71</b>
<b>Total</b>	<b>547.65</b>

### Actions not subject to open calls for proposals

Actions not subject to open calls for proposals	Budget 2010 <sup>28</sup> (EUR million)
Support for data-collection and analysis	1.5
Support for "EURAXESS-Researchers in motion"	2.5
Support for EU Presidency conference	0.15
Impact Assessment of COFUND Action	0.25
European dimension of Researchers' Night	0.25
<b>Total</b>	<b>4.65</b>

All budgetary figures given in this work programme are indicative. Following the evaluation of proposals the final budget awarded to actions implemented through calls for proposals may vary:

- by up to 10% of the total value of the indicated budget for each call; and
- any repartition of the call budget may also vary by up to 10% of the total value of the indicated budget for the call.

The final budgets for evaluation, monitoring and review may vary by up to 20% of the indicated budgets for these actions. The final budget awarded for all other actions not implemented through calls for proposals may vary by up to 10% of the indicated budgets for these actions.

<sup>28</sup> Under the condition that the preliminary draft budget for 2010 is adopted without modification by the budgetary authority.

## **V INDICATIVE PRIORITIES FOR 2011 ONWARDS**

In principle, 2011 will see a continuation of the main Marie Curie actions of 2010. At this stage no new Marie Curie actions are envisaged.

From 2011 onwards, the planned budget increase of the specific programme will allow increased flexibility of its actions, in particular to fully contribute to the European Partnership for Researchers.

Pending the results of the review of the COFUND action, the further evolution of this scheme will be assessed.



## **Annex 1.2 Countries eligible for the International Research Staff Exchange Scheme (IRSES)<sup>29</sup>**

### **Industrialised Countries with EC International agreements on Science and Technology:**

- Australia, Canada, Japan, Rep. of Korea, New Zealand, United States

### **International Cooperation Partnership Countries (ICPC) with EC International agreements on Science and Technology:**

- Argentina, Brazil, China<sup>30</sup>, Chile, Egypt, India, Mexico, Morocco, Russia, South Africa, Tunisia, Ukraine

### **Countries of the European Neighbourhood Policy (ENP):**

- Eastern Europe & Central Asia (EECA)

- Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine,

and

- Mediterranean Partnership Countries (MPC) that are not Associated countries

- Algeria, Egypt, Jordan, Lebanon, Libya, Morocco, Palestinian-administrated areas, Syrian Arab Rep., Tunisia

## **Annex 1.3 Countries eligible for the additional long distance allowance in the IRSES action**

- Argentina
- Australia
- Brazil
- Canada
- Chile
- China
- India
- Japan
- Mexico
- New Zealand
- Rep. of Korea
- South Africa
- United States

<sup>29</sup> and which are not Associated countries for the purpose of the FP

<sup>30</sup> Including Hong Kong and Macao although these territories are not eligible for ICPC funding under the IRSES scheme

## **Annex 2 Eligibility, evaluation, selection and award criteria**

### **Eligibility criteria**

A proposal will only be considered eligible if it meets all of the following conditions:

- It is received by the Commission before the deadline given in the call text.
- It involves at least the minimum number of participants given in the call text.
- It is complete (i.e. both the requested administrative forms and the proposal description are present)
- The content of the proposal relates to the activities and funding scheme(s), including any special conditions, set out in those parts of the relevant work programme

Other eligibility criteria may be given in the work programme text and in the call text.

### **Evaluation criteria**

The evaluation criteria against which proposals will be judged are set out in article 15 of the Rules for Participation. For the 'People' Specific Programme these are:

- scientific and/or technological excellence;
- relevance to the objectives of the Specific Programme<sup>31</sup>;
- the potential impact through the development, dissemination and use of project results;
- the quality and efficiency of the implementation and management.

Within this framework, the work programme specifies the evaluation and selection criteria and may add additional requirements, weightings and thresholds, or set out further details on the application of the criteria.

The purpose of this annex is to set out such specifications. Unless otherwise indicated in the relevant parts of this work programme, the criteria, weightings and thresholds given here will apply to all calls for proposals.

Proposals will be evaluated in line with the Commission 'Rules on Submission of Proposals and the Related Evaluation, Selection and Award Procedures'.

A proposal that contravenes fundamental ethical principles, fails to comply with the relevant security procedures, or which does not fulfil any other of the conditions set out in the specific programme, the work programme or in the call for proposals shall not be selected. Such a proposal may be excluded from the evaluation, selection and award procedures at any time. Details of the procedure to be followed are given in the Commission rules mentioned above.

The arrangements for a particular call will be set out in the relevant Guide for Applicants.

Notes:

1. Evaluation scores will be awarded for each of the criteria, and not for the sub-criteria. Each criterion will be scored out of 5.
2. Weightings and thresholds for the actions under the funding scheme Support for Training and Career Development of Researchers are contained in table 2.1 (per action).

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<sup>31</sup> Relevance: A proposal may be partially relevant if it addresses only marginally the topic(s) of the call, or if only part of the proposal addresses them. Such conditions will be reflected in the evaluation of the first criterion ('S/T excellence'). The degree to which a proposal is relevant to the objectives of a call will be reflected in the evaluation of the third criterion ('impact'). Proposals that are clearly not relevant to a call ('out of scope') will be rejected on eligibility grounds before the evaluation.

The threshold for individual criteria under the funding scheme Coordination and Support Actions will be 3, while no weightings will apply.

3. In the following tables, for the funding scheme **Support for Training and Career Development of Researchers**, and for the funding scheme **Coordination and Support Actions**, the criterion 'Implementation', corresponds to the **selection criteria** in the meaning of Article 115 of the Financial Regulation<sup>32</sup> and its implementing rules<sup>33</sup>. This will also be the basis for assessing the operational capacity of participants. The other criteria correspond to the **award criteria**.

For each action the evaluation criteria, thresholds and weightings are detailed in table 2.1 on the following pages.

### **Priority order for proposals with the same score**

As part of the evaluation by independent experts, a panel review will recommend one or more ranked lists for the proposals under evaluation, following the scoring systems indicated above.

If necessary, the panel will determine a priority order for proposals which have been awarded the same score within a ranked list.

When the total scores are equal, priority will be based on scores for individual evaluation criteria. For each action the priority order of the criteria is detailed in table 2.1.

If necessary, any further prioritisation will be based on other appropriate characteristics, to be decided by the panel, related to the contribution of the proposal to the European Research Area and/or general objectives mentioned in the work programme (e.g. inter-sectoral mobility, international co-operation, favourable employment and working conditions).

Whether or not such a prioritisation is carried out will depend on the available budget or other conditions set out in the call fiche.

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<sup>32</sup> Council Regulation No 1605/2002 of 25 June 2002 on the Financial Regulation applicable to the general budget of the European Communities, OJ L 248 16.09.2002, p.1

<sup>33</sup> Commission Regulation No 2342/2002 of 23 December 2002 laying down detailed rules for the implementation of Council Regulation No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities, OJ L 357 31.12.2002, p.

**TABLE 2.1 EVALUATION CRITERIA, THRESHOLDS AND WEIGHTINGS FOR EACH MARIE CURIE ACTION**

**Note: All activities will be subject to a threshold in the total score of 3.5 out of 5.**

<b>1.1 ITN - Funding Scheme “Support for Training and Career Development of Researchers”: Marie Curie Initial Training Networks</b>				
<b>S&amp;T Quality (award)</b> Threshold: 3, Weighting:30%	<b>Training (award)</b> Threshold: 4, Weighting:30%	<b>Researcher (award) N/A</b>	<b>Implementation (selection)</b> Threshold: 3, Weighting:20%	<b>Impact (award)</b> Threshold: 4, Weighting:20%
<b>Priority in case of ex aequo</b> <b>3</b>	<b>1</b>		<b>4</b>	<b>2</b>
S&T objectives of the research programme, including in terms of inter/multi-disciplinary, intersectoral and/ or newly emerging supra-disciplinary fields.	Quality of the training programme. - Consistency with the research programme. - Contribution and relevance to the training programme of the private sector and, where appropriate, of other socio-economic actors. - Complementary skills offered: Management, Communication, IPR, Ethics, Grant writing, Commercial exploitation of results, Research Policy, entrepreneurship, etc.		Capacities (expertise / human resources/ facilities / infrastructures/private sector involvement) to achieve the research training programme and access of fellows to these resources. Adequacy of task distribution and schedule.	Contribution of the proposed training programme to improvement of the career prospects of the fellows and the acquisition of skills needed in both the public and private sectors.
Scientific quality of the research programme.	Importance and timeliness of the training needs (e.g. multidisciplinary, intersectoral, and newly emerging supra-disciplinary fields)		Private sector involvement at the highest possible level appropriate to the research topic, and sufficient evidence of commitment	Contribution of the training programme to the policy objective of structuring the initial research training capacity at the European level (through establishing longer term collaborations and /or lasting structured training programmes between the partners' organisations)..
Appropriateness of research methodology.	Appropriateness of the size of the requested training programme with respect to the capacity of the host		Adequate exploitation of complementarities and synergies among partners in terms of research and training.	The contribution of the training programme towards the policy objective of enhancing public-private sector collaborations in terms of research training.
Originality and innovative aspect of the research programme. Knowledge of the state-of-the-art. Where appropriate, plans for exploitation of results.	Where applicable, relevance of the role of visiting researcher with respect to the training programme		How essential is non-ICPC Third Country participation, if any, to the objectives of the research training programme.	Where appropriate, mutual recognition by all partners of the training acquired, including training periods in the private sector.
Contribution of the private sector and, where relevant, other socio-economic actors in the research programme	a) For multi-site proposals: Adequate combination of local specialist training with network-wide training activities.  b) For mono-site proposals: Adequate exploitation of the international network of the participants, including the private sector, for the training programme.		Appropriateness of the plans for the overall management of the training programme (demarcation of responsibilities, rules for decision making, composition of supervisory board including involvement of the private sector); also working conditions, transparency of recruitment process and career development in coherence with the principles of the 'Code of conduct for the Recruitment of Researchers'.	
			Networking and dissemination of best practice among partners. Clarity of the plan for organizing training events (workshops, conferences, training courses).	

## 2.1 IEF-Funding Scheme Support for Training and Career Development of Researchers: Marie Curie Intra-European Fellowships for Career Development

<b>S&amp;T Quality (award)</b> Threshold: 3, Weighting:25%	<b>Training (award)</b> Threshold: 3, Weighting:15%	<b>Researcher (award)</b> Threshold: 4, Weighting:25%	<b>Implementation (selection)</b> Weighting:15%	<b>Impact (award)</b> Threshold: 3.5; Weighting:20%
<b>Priority in case of ex aequo</b> <b>3</b>	<b>2</b>	<b>1</b>	<b>5</b>	<b>4</b>
Scientific/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal	Clarity and quality of the research training objectives for the researcher	Research experience	Quality of infrastructure / facilities and International collaborations of host	Potential of acquiring competencies during the fellowship to improve the prospects of reaching and/or reinforcing a position of professional maturity, diversity and independence, in particular through exposure to complementary skills training with special attention to exposure to the industry sector, where appropriate
Research methodology	Relevance and quality of additional scientific training as well as of complementary skills offered, with special attention to exposure to the industry sector, where appropriate.	Research results including patents, publications, teaching etc., taking into account the level of experience	Practical arrangements for the implementation and management of the scientific project	Contribution to career development, or re-establishment where relevant.
Originality and innovative nature of the project, and relationship to the 'state of the art' of research in the field	Host expertise in training experienced researchers in the field and capacity to provide mentoring/tutoring	Independent thinking and leadership qualities	Feasibility and credibility of the project, including work plan	Contribution to European excellence and European competitiveness
Timeliness and relevance of the project		Match between the fellow's profile and project.	Practical and administrative arrangements, and support for the hosting of the fellow	Benefit of the mobility to the European Research Area.
Host scientific expertise in the field		Potential for reaching a position of professional maturity.		
Quality of the group/supervisors		Potential to acquire new knowledge.		

### 2.2.1 ERG Funding Scheme Support for Training and Career Development of Researchers: Marie Curie European Reintegration Grants

<b>S&amp;T Quality (award)</b> Threshold: 3, Weighting:30%	<b>Training</b> N/A	<b>Researcher (award)</b> Weighting:30%	<b>Implementation (selection)</b> Weighting:20%	<b>Impact (award)</b> Weighting:20%
<b>Priority in case of ex aequo</b> <b>2</b>		<b>1</b>	<b>4</b>	<b>3</b>
Scientific/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal		Research experience	Quality of host organisation, including adequacy of infrastructures/facilities.	Benefit to the career of the researcher from the period of re-integration
Research methodology		Scientific and technological quality of previous research during the Marie Curie Fellowship	Feasibility and credibility of the project, including work plan	Capacity to developed lasting co-operation with the previous country of the Marie Curie Fellowship. (if relevant)
Originality and innovative nature of the project, and relationship to the 'state of the art' of research in the field		Independent thinking and leadership qualities	Practical arrangements for the implementation and management of the scientific project	Potential of transferring knowledge to host
Timeliness and relevance of the project		Match between the fellow's profile and project.		Potential and quality of lasting professional integration (expected length of work contract, expected career development)

### 2.2.2 IRG Funding Scheme Support for Training and Career Development of Researchers: Marie Curie International Reintegration Grants

<b>S&amp;T Quality (award)</b> Threshold: 3, Weighting:30%	<b>Training</b> N/A	<b>Researcher (award)</b> Threshold: 3, Weighting:30%	<b>Implementation (selection)</b> Weighting:20%	<b>Impact (award)</b> Weighting:20%
<b>Priority in case of ex aequo</b> <b>2</b>		<b>1</b>	<b>4</b>	<b>3</b>
Scientific/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal		Research experience	Quality of host organisation, including adequacy of infrastructures/facilities.	Potential of transferring knowledge to host
Research methodology		Scientific and technological quality of previous research	Feasibility and credibility of the project, including work plan	Capacity to develop lasting co-operation with the third country.
Originality and innovative nature of the project, and relationship to the 'state of the art' of research in the field		Independent thinking and leadership qualities	Management: Practical arrangements for the implementation and management of the scientific project	Contribution to scientific excellence by attracting first class researchers or in the exceptional case where the researcher has already gained an employment position in Europe by producing a significant improvement in his/her employment condition or career prospects.
Timeliness and relevance of the project		Match between the fellow's profile and project.		Contribution to European excellence and European competitiveness
		Benefit to the career of the researcher from the period of re-integration		Potential and quality of lasting professional integration (expected length of work contract, expected career development)



#### **4.1 IOF Funding Scheme Support for Training and Career Development of Researchers: Marie Curie International Outgoing Fellowships for Career Development**

<b>S&amp;T Quality (award)</b> Threshold: 3, Weighting:25%	<b>Training (award)</b> Threshold: 3, Weighting:15%	<b>Researcher (award)</b> Threshold: 4, Weighting:25%	<b>Implementation (selection)</b> Weighting:15%, split where appropriate between the 3 <sup>rd</sup> country institution and the European host	<b>Impact (award)</b> Threshold: 3.5; Weighting:20%
<b>Priority in case of ex aequo</b> <b>3</b>	<b>2</b>	<b>1</b>	<b>5</b>	<b>4</b>
Scientific/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal	Clarity and quality of the research training objectives for the researcher	Research experience	Quality of infrastructure / facilities and International collaborations of host (outgoing and return host)	Potential of acquiring competencies during the fellowship to improve the prospects of reaching and/or reinforcing a position of professional maturity, diversity and independence, in particular through exposure to complementary skills training
Research methodology	Relevance and quality of additional scientific training, as well as complementary skills offered	Research results including patents, publications, teaching etc., taking into account the level of experience	Practical arrangements for the implementation and management of the scientific project (outgoing and return host)	Contribution to career development, or re-establishment where relevant.
Originality and innovative nature of the project and relationship to the 'state of the art' of research in the field	Host expertise in training experienced researchers in the field and capacity to provide mentoring/tutoring (outgoing and return host)	Independent thinking and leadership qualities	Feasibility and credibility of the project, including work plan	Potential for creating long term collaborations and mutually beneficial co-operation between Europe and the third country
Timeliness and relevance of the project		Match between the fellow's profile and project.	Practical and administrative arrangements, and support for the hosting of the fellow (outgoing and return host)	Contribution to European excellence and European competitiveness
Host scientific expertise in the field (outgoing and return host)		Potential for reaching a position of professional maturity		Benefit of the mobility to the European Research Area
Quality of the group/supervisors (outgoing and return host)		Potential to acquire new knowledge.		

## 4.2 IIF Funding Scheme Support for Training and Career Development of Researchers: Marie Curie International Incoming Fellowships

S&T Quality (award) Threshold: 3, Weighting:25%	Transfer of knowledge (award) Weighting:15%	Researcher (award) Threshold: 4, Weighting:25%	Implementation (selection) Weighting:15%	Impact (award) Threshold: 3.5; Weighting:20%
<b>Priority in case of ex aequo</b> <b>3</b>	<b>2</b>	<b>1</b>	<b>5</b>	<b>4</b>
Scientific/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal	Potential of transferring knowledge to European host and/or bringing knowledge to Europe	Research experience	Quality of infrastructure / facilities and International collaborations of host	Potential for creating long term collaborations and mutually beneficial co-operation between Europe and the third country
Research methodology	Clarity and quality of the transfer of knowledge objectives	Research results including patents, publications, teaching etc.	Practical arrangements for the implementation and management of the scientific project	Contribution to European excellence and European competitiveness
Originality and innovative nature of the project, and relationship to the 'state of the art' of research in the field		Independent thinking, leadership qualities, and capacity to transfer knowledge	Feasibility and credibility of the project, including work plan	
Timeliness and relevance of the project		Match between the fellow's profile and project.	Practical and administrative arrangements, and support for the hosting of the fellow	Benefit of the mobility to the European Research Area
Host scientific expertise in the field				
Quality of the group/researchers in charge				

#### 4.4 IRSES Funding scheme: International Research Staff Exchange Scheme.

<b>Quality of the Exchange Programme</b> Weighting:25%	<b>Transfer of Knowledge</b> Threshold: 3, Weighting:30%	<b>Implementation</b> Weighting:15%	<b>Impact</b> Threshold: 3, Weighting:30%
<b>Priority in case of ex aequo</b> <b>1</b>	<b>2</b>	<b>4</b>	<b>3</b>
Objective and relevance of the joint exchange programme	Quality and mutual benefit of the transfer of knowledge	Capacities (expertise/human resources/facilities/infrastructure) to achieve the objectives of the planned cooperation	Relevance of the proposed partnership to the area of collaboration and for the ERA
Scientific quality of the partners	Adequacy and role of staff exchanged with respect to the transfer of knowledge	Appropriateness of the plans for the overall management of the exchange programme	Potential to develop lasting collaboration with eligible Third country partners.
Complementarities/synergies between the partners			

<b>Funding Scheme: Coordination and Support Actions</b>		
<b>Scientific and/or technological excellence (award)</b>	<b>Quality and efficiency of the implementation and the management (selection)</b>	<b>The potential impact through the development, dissemination and use of project results (award)</b>
Threshold: 3	Threshold: 3	Threshold: 3
<b>Priority in case of ex aequo</b> <b>5.1 Night: 2</b> <b>5.2 EURAXESS: N/A</b>	<b>3</b> <b>1</b>	<b>1</b> <b>2</b>
Soundness of concept, and quality of objectives	Appropriateness of the management structure and procedures  Quality and relevant experience of the individual participants	Contribution, at the European [and/or international] level, to the expected impacts listed in the work programme under relevant topic/activity
In case of Coordinating action:  Contribution to the co-ordination of high quality research	Quality of the consortium as a whole (including complementarity, balance) [for Support Actions: only if relevant]	Appropriateness of measures for spreading excellence, exploiting results, and dissemination knowledge, through engagement with stakeholders, and the public at large.
In case of Coordinating action:  Quality and effectiveness of the co-ordination mechanisms, and associated work plan	Appropriateness of the allocation and justification of the resources to be committed (budget, staff, equipment)	
In case of Supporting action:  Quality and effectiveness of the support action mechanisms, and associated work plan		

### **Annex 3 Community contribution and applicable rates**

#### **SUPPORT FOR TRAINING AND CAREER DEVELOPMENT OF RESEARCHERS**

The financial contribution of the Community to the indirect actions takes in general the form of grants covering up to 100% of the budget of the indirect action, comprising, if the case arises, predetermined fixed amounts according to rates for certain expenses. The Community contribution is normally calculated on the basis of eligible activities as well as possible specific conditions given in the description of each action and according to the tables given below.

For longer stays the host organisation shall appoint each eligible researcher under an employment contract except in adequately documented cases or where national regulation would prohibit this possibility. For shorter stays the host organisation can opt between recruiting him/her under an employment contract or under a fixed amount fellowship.

Table 3.1 gives the yearly reference rates for calculating the monthly living allowances of each eligible researcher. The amounts per year are given in Euros per category of researchers who are recruited under an employment contract/fellowship with full social security coverage. These amounts include the provisions for all compulsory deductions under national applicable legislation and represent an increase of roughly 3.9% over the 2009 work programme, reflecting the average inflation in the EU during the intervening period as published by EUROSTAT.

**Table 3.1: Yearly reference rates for monthly living allowances under employment contracts (Correction Coefficient index 100)<sup>34</sup>**

<b>Researchers Categories</b>	<b>EUR/year</b>
Early-stage researchers	<b>36 700</b>
Experienced researchers (< 10 years experience)	<b>56 400</b>
Experienced researchers (>10 years experience)	<b>84 500</b>

When an employment contract cannot be provided, the host organisation shall recruit the researcher under a status equivalent to a fixed-amount fellowship. The rates applicable in these duly justified cases will be 50% of the rates for researchers under an employment contract. Researchers can only be recruited under a fixed-amount fellowship if this is compatible with national legislation of the country of the host organisation. The host organisation must ensure that coverage for at least sickness and maternity benefits in kind, invalidity and accidents at work and occupational diseases is provided to the researcher. This coverage does not necessarily have to be paid from the Community contribution for the fixed-amount fellowship.

The host organisation receiving Community funding under Table 3.1 above, must pay to the selected researchers a minimum contribution according to these reference allowances, taking into account all compulsory deductions under national legislation in the context of the project. The host organisation may pay a top-up to the eligible researchers in order to complement this contribution.

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<sup>34</sup> Rates for individual countries are obtained by applying to these rates the correction factors for cost of living, as referred in Table 3.3

As to parental leave benefits it has to be noted that the Commission can decide, on request by the researchers and the host organisation, to augment the sum of the Community contribution for the reimbursement of compulsory and non-recoverable costs under the applicable national law. Such a request, supported by the pertinent documents, has to be submitted with the final reports at the end of the project. Calculated on a monthly basis, the contribution shall not exceed the difference between the compensation received from the national social insurance regime and the amount of the Community contribution mentioned in Table 3.1.

Along with the living allowance, a **mobility allowance** will be paid for some categories of researchers as specified in Table 3.4, which will take due account of the family situation of the researcher. In this context family is defined as persons linked to the researcher by (i) marriage, or (ii) a relationship with equivalent status to a marriage recognised by the national legislation of the country of the host organisation or of the nationality of the researcher; or (iii) dependant children who are actually being maintained by the researcher. This allocation, as well as the travel allowance, will only be due for researchers doing a trans-national mobility.

The annual **travel allowances** are specified in Table 3.2. For researchers eligible to receive travel allowances, the allowance is based on the direct distance (in a straight line) between the place of origin and the host institution of the researcher, calculated on the basis of one payment for every period of 12 months or less, when the first period or the last one is less than 12 months. Only one travel allowance shall be paid per period of 12 months, independently of possible interruptions or stays with different partners.

**Table 3.2: Annual travel allowances**

<b>Distance (km)</b>	<b>Fixed-amount contribution (EUR)</b>
< 500	250
500 – 1 000	500
1 000 – 1 500	750
1 500 – 2 500	1 000
2 500 – 5 000	1 500
5 000 – 10 000	2 000
>10 000	2 500

The various rates resulting from Tables 3.1 to 3.4 are for researchers devoting themselves to their project on a full-time basis (pro-rata for parts of years). In exceptional cases, where researchers, in agreement with the host organisation, and with prior approval by the Commission, execute their project on a part-time basis, the rates will apply proportionally without the possibility that the total amounts will exceed those that apply for full-time equivalent periods. The same principle will also apply in case of split of a project into several distinct periods.

#### **Maximum Reimbursement Rates (Coordination and Support Actions)**

The upper limits foreseen in the Rules for Participation (Article 33) for the Community financial contribution are summarised in the following table.

	Non-profit public bodies, secondary and higher education establishments, <i>research organisations</i> and SMEs	All other organisations
Coordination and support actions	100%	100%

### Table 3.3 Correction Coefficients

#### The EU-25 Member States<sup>35</sup>

Austria	107.8
Belgium**	100.0
Bulgaria	86.3
Cyprus	89.2
Czech Republic	98.1
Denmark	139.4

Estonia	85.0
Finland	119.8
France	115.5
Germany	98.9
Greece	95.0
Hungary	94.0

Ireland	121.9
Italy	111.5
Latvia	85.1
Lithuania	76.3
Luxembourg**	100
Malta	85.0

Netherlands	119.1
Poland	93.8
Portugal	91.7
Romania	75.2
Slovak Rep.	87.3
Slovenia	90.2

Spain	101.6
Sweden	115.3
UK	125.6

\*\* Belgium and Luxembourg are the basis of the correction coefficient and is therefore always static at 100,0

<sup>35</sup> For the EU-25 Member States based on the Council Regulation No 1895/2006 of 19 Dec 2006 (OJ L397, 30.12.2006) page 6, adjusting the weightings applicable to the remuneration of officials of the European Communities. For the other countries (and Bulgaria and Romania as most recent two EU Member States in transition) it is based on an updating of Council Regulation (EC) No 453/2007 of 25 April 2007 laying down the weightings applicable from 1 July 2006 to the remuneration of officials of the European Communities and EC.N° 4-2009 / 16.01.2009.)

## The non-EU Countries and New Caledonia a French overseas territory<sup>36</sup>

Albania	78.5	Cameroon	109.7	Ethiopia	77.8	Ivory Coast**	98.7	Morocco	86.9	Senegal	88.1	Trinidad & Tobago	61.6
Algeria	87.5	Canada	78.9	Fiji	72.2	Japan	105	Mozambique	71.9	Serbia	73.9	Tunisia	68.7
Angola	112.8	Cape Verde	74.4	FYROM	71.1	Jordan	70	Namibia	57.5	Sierra Leone	68.9	Turkey	80.7
Argentina	54.7	Cen African Rep.	113.1	Gabon	110.4	Kazakhstan	73.3	Nepal	66	Singapore	95.8	Uganda	69.9
Armenia	71.1	Chad	129.3	Gambia	70.3	Kenya	73.8	<b>New Caledonia</b>	<b>140.4</b>	Solomon Islands	85.6	Ukraine	109.4
Australia	108.5	Chile	57.7	Gaza Strip	103.1	Kosovo	57.5	New Zealand	89.8	South Africa	46.9	Uzbekistan	45.4
Azerbaijan	72.9	China	74.6	Georgia	99.7	Kyrgyzstan	86.7	Nicaragua	46.2	South Korea	90.7	US	88.3
Bangladesh	45.4	Colombia	79.2	Ghana	54.3	Laos	77.6	Niger	85.7	Sri Lanka	58.1	Uruguay	73.2
Barbados	105.5	Congo	129.1	Guatemala	70.7	Lebanon	80	Nigeria	93	Sudan	68.8	Vanuatu	105.6
Belarus	62.7	Costa Rica	68.7	Guinea	55.7	Lesotho	47.3	Norway	131.2	Suriname	39.7	Venezuela	61
Benin	92.9	Côte d'Ivoire	99.9	Guinea-Bissau	114.6	Liechtenstein***	110.1	Pakistan	43.9	Swaziland	46.4	Vietnam	40.2
Bermuda	151.5	Croatia	106.3	Guyana	53.5	Madagascar	84.2	Panama	52.2	Switzerland	110.1	West Bank	103.1
Bolivia	49.5	Cuba	73.5	Haiti	104.2	Malawi	63.6	Papua NewGuinea	73.5	Syria	66.8	Yemen	57
Bosnia & Herzegovina	70.7	Dem Rep Congo	112.3	Honduras	60.3	Malaysia	65.8	Paraguay	83.6	Taiwan	77.3	Zambia	63.2
Botswana	46	Djibouti	85.4	Hong Kong	83.4	Mali	83.5	Peru	67.4	Tajikistan	61.2		
Brazil	95.5	Dominican Rep.	58.2	Iceland*	131.2	Mauritania	61.2	Philippines	61	Tanzania	61.4		
Burkina Faso	96.5	Ecuador	57.9	India	50.9	Mauritius	72.6	Russia	121.8	Thailand	52.4		
Cambodia	62.7	Egypt	33.8	Indonesia	59.3	Mexico	69.7	Rwanda	82.7	Timor Leste	56.6		
		El Salvador	63.6	Israel	118.9	Moldova	67.1	Samoa	65.5	Togo	87		
		Eritrea	41.9	Jamaica	86.1	Montenegro	68.9	Saudi Arabia	79.1	Tonga	85		

These Correction Coefficients were published on 14<sup>th</sup> July 2009, in OJ L 181/1-7

Exceptions:

\* For Iceland the coefficient for Norway applies.

\*\* This is the Correction Coefficient introduced for specific countries as per Commission Decision published in IA No 24-2008/08.05.2008, "Weightings applicable in third countries, Articles 12 and 13 of Annex X to the Staff Regulations.

\*\*\* For Liechtenstein the coefficient for Switzerland applies.

<sup>36</sup> For countries where the correction coefficient is not available, the Commission will decide on a **case-by-case** basis.

**Table 3.4. Structure of the Community contribution (N/A= Not applicable; For COFUND and IRSES, financial details are given in the text)**

1.1 Action ITN	Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
	- A -	- B -	- C -	- D -	- E -	- F -	- G -	- H -	- I -
	Monthly living and mobility allowance	Travel Allowance	Career exploratory allowance	Contribution to the participation expenses of eligible researchers	Contribution to the research/ training /transfer of knowledge programme expenses	Contribution to the organisation of international conferences, workshops and events	Management activities (including audit certification if applicable)	Contribution to overheads	Other types of eligible expenses / specific conditions
Marie Curie Initial Training Networks	<p><b>1- Monthly living allowance:</b> fixed amount as specified in Table 3.1. For researchers supported as “visiting researcher” under this activity the reference rates are 30% higher than the rates applied to the corresponding category of experienced researcher in Table 3.1.</p> <p><b>2- Monthly mobility allowance:</b> fixed amount to cover expenses linked to the relocation of the researcher and her/his family in the host country: reference rate of EUR 500 for researchers without a family and EUR 800 for researchers with family. The reference date for the family situation is the date of recruitment of the researcher.</p> <p>The monthly living allowance and the monthly mobility allowance rates for individual countries are obtained by applying to these rates the correction factor for the cost of living as referred to in Table 3.3.</p>	Fixed amount as specified in Table 3.2	Fixed amount of EUR 2 000 for each researcher with a stay of at least one year	Contribution managed by the hosting organisations for expenses related to the participation of eligible researchers to research and training activities (meeting and conference attendance, participation in training actions, research costs, etc ): fixed amount of EUR 300 per researcher-month, recruited for initial training, for non laboratory based research training projects; EUR 600 per researcher-month, recruited for initial training, for laboratory based research training projects	Contribution to the host organisation for the execution of the training project (publication of vacant positions, internal joint training actions, teaching material, etc), organisation of conferences, workshops and events (invitation of keynote speakers, publications, rental of premises, web casting), and contribution to the expenses related to the co-ordination between participants (network meetings, detachment of staff, etc): fixed amount of EUR 1200 per researcher month	<i>N/A</i>	Maximum of 7 % of the total Community contribution for networks and a maximum of 3% for mono- partner	10 % of direct costs except for subcontractors and the costs of the resources made available by third parties which are not used in the premises of the beneficiary.	N/A

2.1 Action IEF	Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
	- A - Monthly living and mobility allowance	- B - Travel Allowance	- C - Career exploratory allowance	- D- Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	-F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification if applicable)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
Marie Curie Intra-European Fellowships for Career Development	<p><b>1- Monthly living allowance:</b> fixed amount as specified in Table 3.1.</p> <p><b>2- Monthly mobility allowance:</b> fixed amount to cover expenses linked to the relocation of the researcher and her/his family in the host country: reference rate of EUR 500 for researchers without a family and EUR 800 for researchers with family. The reference date for the family situation is the relevant deadline for submission of proposals.</p> <p>The monthly living allowance and the monthly mobility allowance rates for individual countries are obtained by applying to these rates the correction factor for the cost of living as referred to in Table 3.3.</p>	Fixed amount as specified in Table 3.2.	Fixed amount of EUR 2 000 for each researcher with a stay of at least one year.	Contribution managed by the hosting organisations for expenses related to the participation of eligible researchers to research and training activities (meeting and conference attendance, participation in training actions, research costs, etc ): fixed amount of EUR 500 per researcher-month for non-laboratory based research projects ; EUR 800 per researcher-month for laboratory based research projects.	<u>N/A</u>	<u>N/A</u>	Fixed-amount of EUR 700 per researcher-month, to which the correction factor for the cost of living as referred to in Table 3.3, is applied. The total amount of this contribution cannot exceed 20% of the total direct costs excluding the direct eligible costs for sub-contracting and the costs of resources made available by third parties which are not used on the premises of the beneficiary.		<u>N/A</u>

2.2/4.3 Action ERG – IRG <sup>37</sup>	Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
	- A - Monthly living and mobility allowance	B Travel Allowance	- C - Career exploratory allowance	- D - Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	- F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
2.2 Marie Curie European Reintegration Grants	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	Contribution managed by the hosting organisation for expenses related to the integration of the researcher in the host institution: fixed amount scheme (EUR <u>15 000</u> ) per researcher/year during the period of reintegration up to a max. of 3 years.
4.3 Marie Curie International Reintegration	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	Contribution managed by the hosting organisation for expenses related to the integration of the researcher in the host institution: fixed amount scheme (EUR <u>25 000</u> ) per researcher/year during the period of reintegration up to a max. of 4 years.

<sup>37</sup> In cases of durations that are not a multiple of 12 months, the contribution will consist of monthly fixed amounts calculated as a proportion of the yearly amounts

4.1 Action IOF	Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
	- A - Monthly living and mobility allowance	- B - Travel Allowance	- C - Career exploratory allowance	- D - Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/ training /transfer of knowledge programme expenses	- F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification if applicable)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
Marie Curie International Outgoing Fellowships for Career Development	<p><b>1- Monthly living allowance:</b> fixed amount as specified in Table 3.1.</p> <p><b>2- Monthly mobility allowance:</b> fixed amount to cover expenses linked to the relocation of the researcher and her/his family in the host country: reference rate of EUR 500 for researchers without a family and EUR 800 for researchers with family. The reference date for the family situation is the relevant deadline for submission of proposals.</p> <p>The monthly living allowance and the monthly mobility allowance rates for individual countries are obtained by applying to these rates the correction factor for the cost of living as referred to in Table 3..3</p> <p><b>Reintegration phase:</b> the monthly mobility allowance is not applicable in the case of reintegration in the researcher's country of origin<sup>38</sup></p>	Fixed amount as specified in Table 3.2.	<u>N/A</u>	Contribution managed by the hosting organisations for expenses related to the participation of eligible researchers to research and training activities (meeting and conference attendance, participation in training actions, research costs, etc): fixed amount of EUR 500 per researcher-month for non-laboratory based research projects ; EUR 800 per researcher-month for laboratory based research projects.	<u>N/A</u>	<u>N/A</u>	Fixed-amount of EUR 700 per researcher-month, to which the correction factor for the cost of living as referred to in Table 3.3, is applied. The total amount of this contribution cannot exceed 20% of the total direct costs excluding the direct eligible costs for sub-contracting and the costs of resources made available by third parties which are not used on the premises of the beneficiary.	<u>N/A</u>	

<sup>38</sup> The *country of origin* of the researcher is defined as the country where the researcher has carried out his/her main activity for the longest period in the three years immediately preceding the call deadline.

4.2 Action IIF		Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
		- A - Monthly living and mobility allowance	- B - Travel Allowance	- C - Career exploratory allowance	- D - Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	- F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification if applicable)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
Marie Curie Incoming International Fellowships	Incoming phase	<p><b>1- Monthly living allowance:</b> fixed amount as specified in Table 3.1.</p> <p><b>2- Monthly mobility allowance:</b> fixed amount to cover expenses linked to the relocation of the researcher and her/his family in the host country: reference rate of EUR 500 for researchers without a family and EUR 800 for researchers with family. The reference date for the family situation is the relevant deadline for submission of proposals.</p> <p>The monthly living allowance and the monthly mobility allowance rates for individual countries are obtained by applying to these rates the correction factor for the cost of living as referred to in Table 3.3.</p>	Fixed amount as specified in Table 3.2.	<u>N/A</u>	Contribution managed by the hosting organisations for expenses related to the participation of eligible researchers to research and training activities (meeting and conference attendance, participation in training actions, research costs, etc): fixed amount of EUR 500 per researcher-month for non-laboratory based research projects ; EUR 800 per researcher-month for laboratory based research projects.	<u>N/A</u>	<u>N/A</u>	Fixed-amount of EUR 700 per researcher-month, to which the correction factor for the cost of living as referred to in Table 3.3, is applied. The total amount of this contribution cannot exceed 20% of the total direct costs excluding the direct eligible costs for sub-contracting and the costs of resources made available by third parties which are not used on the premises of the beneficiary.	<u>N/A</u>	
	Possible return phase <sup>39</sup>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	Contribution managed by the hosting organisation for expenses related to the integration of the researcher in the host institution: fixed amount scheme (EUR <u>15000</u> ) per researcher/year during the period of reintegration up to a max. of 1 year.

<sup>39</sup> In cases of durations that are not a multiple of 12 months, the contribution will consist of monthly fixed amounts calculated as a proportion of the yearly amounts.