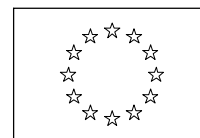




Research Executive Agency



# THE 2011 PEOPLE PROGRAMME GUIDE FOR APPLICANTS

## Marie Curie Actions (Call-Specific)

Marie Curie International Outgoing Fellowships for Career  
Development (IOF)

Call identifier FP7-PEOPLE-2011-IOF

Closing Date: 11 August 2011 at 17:00:00 (Brussels local  
time)

To be read in conjunction with the Guides for Applicants,  
Common and Ethics Parts

Date of publication: 14/07/2011

Version Number: 2011.2



**Please note**

The 2011 Marie Curie Actions are:

FP7-PEOPLE-2011-**CIG**  
FP7-PEOPLE-2011-**COFUND**  
FP7-PEOPLE-2011-**IAPP**  
FP7-PEOPLE-2011-**IEF**  
FP7-PEOPLE-2011-**IIF**  
FP7-PEOPLE-2011-**IOF**  
FP7-PEOPLE-2011-**IRSES**  
FP7-PEOPLE-2011-**ITN**

Guides for Applicants for any other action in the PEOPLE programme, or indeed in any FP7 programme, can be found by following the links at <http://ec.europa.eu/research/participants/portal>

**This Guide is based on the rules and conditions contained in the legal documents relating to FP7 (in particular the Seventh Framework Programme, Specific Programmes, Rules for Participation, and the Work Programmes), all of which can be consulted via the Participant Portal.**

**This Guide does not in itself have any legal value, and thus does not supersede those documents.**

This is a **Corrigendum to the Guide for Applicants** published on 16 March 2011  
Version Number: 2011.1 for the call:

### ***FP7-PEOPLE-2011-IOF***

The Corrigendum replaces **point 1.6 "Financial Regime"** of the above mentioned Guide for Applicants. The changes are the followings:

- Costs related to management activities of the beneficiary cannot be charged to the project.
- Eligible expenses should follow in one of the following categories: living allowance, mobility allowance, contribution to the training expenses of the eligible experienced researcher and contribution to overheads. No formal difference exists between expenses for the activities carried out by the experienced researcher and expenses for the activities of the host organisation for the benefit of the experienced researcher.

# Foreword

This is the Guide for Applicants (Call-Specific) for the call:

## ***FP7-PEOPLE-2011-IOF***

This guide for the Marie Curie International Outgoing Fellowships has been revised and **some of the main changes** with regard to the 2010 Guide for Applicants are:

- Eligible researchers from Other Third Countries who have been residing and carrying out their main activity in Member States or associated countries for at least the 5 years prior to the submission deadline are also eligible for this action;
- **Change in the criteria for evaluation:** "Impact" now has an additional subcriterion, "Impact of the proposed outreach activities to be evaluated in the light of the principles of the 'European Charter for Researchers' and the 'Code of Conduct for the Recruitment of Researchers'."
- **Allowances:** mobility, travel and career exploratory allowances have been merged into one single allowance. This mobility allowance is a monthly payment of a flat rate contribution to cover expenses related to the mobility (relocation, family expenses, language courses, travel expenses etc.)

## Definitions used throughout this Guide

**Experienced researchers** must, at the time of the relevant deadline for submission of proposals be in possession of a doctoral degree or have at least four years of full-time equivalent research experience.

**Full-time equivalent research experience** is measured from the date when a researcher obtained the degree which would formally entitle him or her 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.

**Host organisation (return host organisation)** is the legal entity established in a European Union Member State (MS) or Associated country (AC) with which the REA will sign the *grant agreement* and where the re/integration phase of the project is going to take place;

**Partner organisation (outgoing host organisation)** is a legal entity established in an Other Third Country where the outgoing phase will take place. The partner organisation will conclude a *partnership agreement* with the host organisation;

**Partnership agreement** means the strategic partnership agreement signed between the host organisation and partner organisation for the purpose of the research training activities of the experienced researcher;

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

**Scientist in charge** is the scientist team leader located at the *host organisation* who will supervise the researcher during the whole duration of the project. He/she will be the main contact person of the REA concerning the submitted proposal (e.g. for additional information, invitation to hearings, sending of evaluation results, invitation to negotiations).

**Coordinator** is the participant who is taking the lead in the preparation of the proposal as the "proposal coordinator". For a given proposal, the coordinator acts as the single point of contact between the participants and the REA. Please note that, before the call deadline, the researcher would be considered as the "proposal coordinator". However after the call deadline the *scientist in charge* will be the only single contact point. The researcher and the *scientist in charge* cannot be the same person.

**Mobility:** at the time of the relevant deadline for submission of proposals, 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. Compulsory national service and/or 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 in the same appointing organisation.

**Fellow** is the eligible *experienced researcher* who benefits from the IOF fellowship in the host organisation.

**Work Programme:** 2011 Work Programme PEOPLE, European Commission Decision C(2010)8947 of December 2010

# 1. About the Marie Curie Action: "International Outgoing Fellowships for Career Development" (IOF)

## 1.1 General Aspects

### 1.1.1 Purpose

The specific objectives of the Marie Curie International Outgoing Fellowships for Career Development can be described as follows:

*"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 an Other Third Country. Subsequently, these researchers will return with the acquired knowledge and experience to an organisation in a Member State or Associated country" (2011 "People" Work Programme)*

*Experienced researchers* applying to this action need to identify and develop a research training project that will provide the means to advance significantly in their career. A fundamental concept underlying this action is that of advanced training and life-long learning. In essence, the fellowship should enable the *experienced researcher* to progress in the development of his/her career and should not represent a temporary solution. The fellowship is expected to be part of a structured, long-term professional development plan that is coherent with past achievements and clearly defines the future aims of the researcher.

### 1.1.2 Structure

Proposals for IOF involve formally a *host organisation* established in a Member State or Associated country, and a *partner organisation* established in an Other Third Country. The project proposals are submitted by *experienced researchers* who meet the eligibility criteria (see later in this Guide) in liaison with a *host organisation* which is represented by the *scientist in charge*. A proposal should be submitted by the *experienced researcher* provided that he/she has the approval of the *host organisation*. It is important to note that the *experienced researcher* (future fellow) and the *scientist in charge* are two different people.

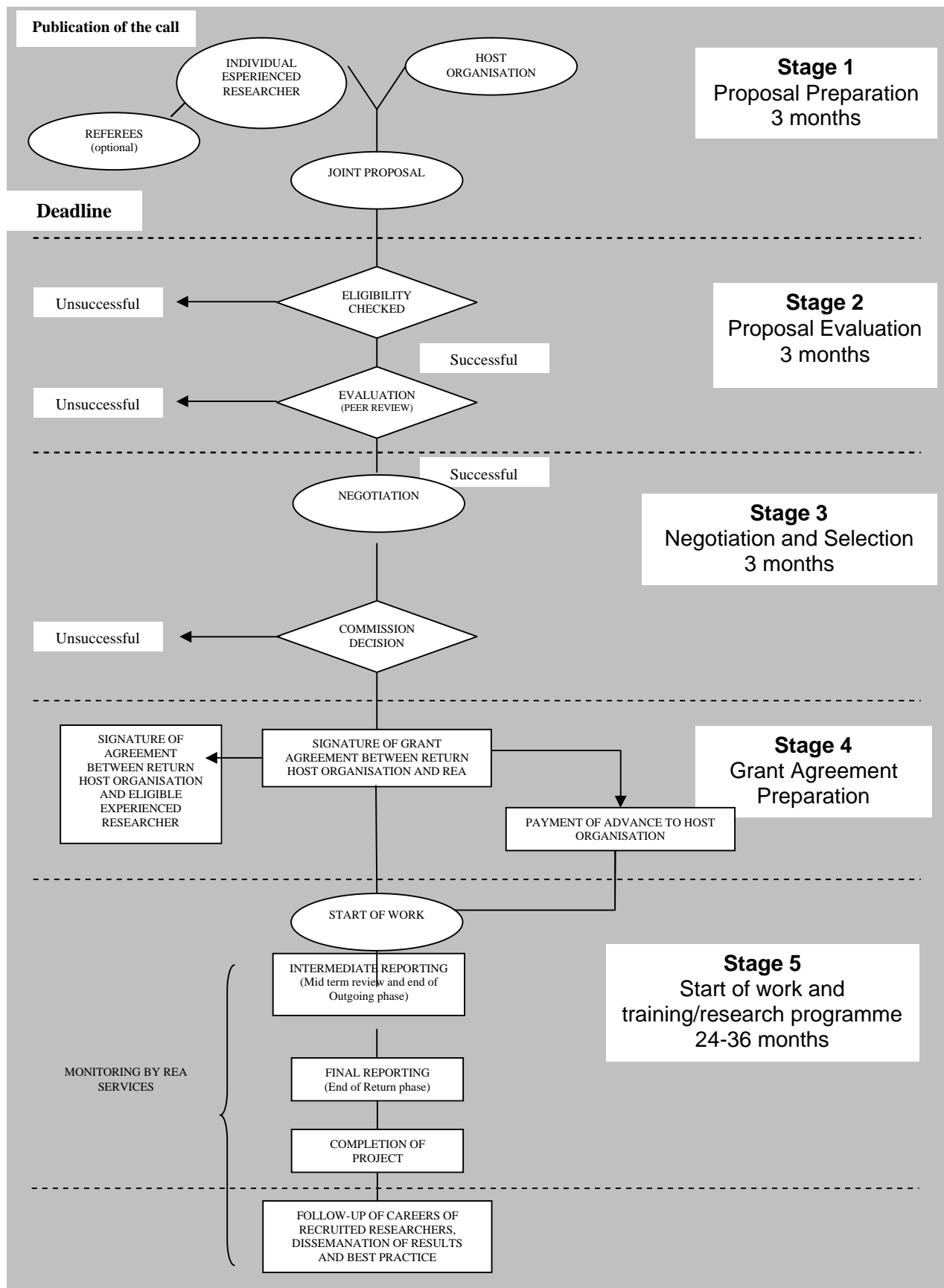
### 1.1.3 Duration

International Outgoing Fellowships have a duration of between 24 and 36 months (full time equivalent), with an outgoing phase of 12 to 24 months and a final **mandatory** reintegration phase of 12 months (2011 Work Programme).

### 1.1.4 How does it work?

The following page shows the lifecycle of an International Outgoing Fellowship.

# LIFE CYCLE OF AN IOF



### 1.1.5 The topic of the Project

All Marie Curie actions have a **bottom-up approach**, i.e. all fields of research of interest to the European Union are eligible for funding (except areas of research covered by the EURATOM Treaty). All research carried out must respect fundamental ethics principles, and the requirements set out in the text of the People Specific Programme. See also the Guide for Applicants (Ethics).

### 1.1.6 The Concept of Panels

Proposals will be classified into Evaluation Panels under eight major areas of research: Chemistry (CHE); Social and Human Sciences (SOC); Economic Sciences (ECO), Information Science and Engineering (ENG); Environmental and Geo-Sciences (ENV); Life Sciences (LIF); Mathematics (MAT); Physics (PHY).

The applicant chooses the panel to which the proposal will be associated at the proposal submission stage and this should be considered as the core discipline. Additional keywords are used to define the other disciplines that may be involved. The choice of panel and keywords will guide the REA in the selection of experts for proposal evaluation. The REA reserves the right to move proposals from one panel to another. Note that there is no predefined budget allocation among the panels in the call for proposals. The budget will be distributed over the panels based on the proportion of eligible proposals received in each panel. To help you select the most relevant panel for your proposal a breakdown of each research area into a number of sub-disciplines is provided in Annex 3 of this Guide.

## 1.2 Participants (Return Host Organisations)

Participants are legal entities established in Member States or Associated countries<sup>1</sup>. Further details can be found in the Guide for Applicants (Common part)

**'Legal entity'** means any legal person created under the national law of its place of establishment, or under Union law or international law, which has legal personality and which may, acting in its own name, exercise rights and be subject to obligations.

Many different types of *host organisation* can take part in IOF such as:

- National Governmental or public organisations (e.g. universities, research centres etc)
- International Organisations
- Commercial enterprises, including those of small and medium size (SMEs)
- Non-profit or charitable organisations (e.g. NGOs, trusts, etc.)
- International European Interest Organisations (e.g. CERN, EMBL, etc.)
- The Joint Research Centre of the European Commission.

#### Where can the outgoing phase take place?

The initial part of training (the outgoing phase) is to be spent in a distinct legal entity in an Other Third Country (*partner organisation*), where the *experienced researcher* is seconded.

A **Partnership agreement** has to be signed between the *host organisation* and the *partner organisation* for the purpose of the research training activities in compliance with the obligations stemming from the grant agreement.

---

<sup>1</sup> Please note the distinction between the research entity (i.e. the lab where the fellow will carry out her/his project) and the legal entity (i.e. the legal person with whom REA signs the grant agreement for example, the University of X)

### 1.3 Eligible Researchers

A number of eligibility criteria must be fulfilled **at the deadline for proposal submission**. After the deadline, submitted proposals will be checked for eligibility and those proposals that do not meet the criteria will not undergo evaluation and will be rejected.

These eligibility criteria will be checked on the basis of information provided by the applicant in the proposal, particularly information given in the part A form. If at a later stage, an eligibility criterion is found not to be fulfilled (for example, due to incorrect or misleading information contained in the proposal or because the applicant has not been awarded his or her PhD or has insufficient post-graduate research experience), the proposal will be immediately rejected.

#### 1.3.1 Level of Experience

International Outgoing Fellowships are directed exclusively at **experienced researchers**, namely those who either:

- i) **have at least 4 years of research experience (full-time equivalent) after obtaining 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 will be provided; or**
- ii) **are already in possession of a doctoral degree (PhD).**

The **time limit to fulfil** one of these conditions is the **deadline** for proposal submission of the relevant call.

The required research experience does not include breaks during the research career of a researcher, irrespective of the reason (e.g. working outside research, family reasons, etc.).

Note that in the context of Marie Curie actions, Medical Doctor (MD) studies are not taken as equivalent to PhD studies. For MDs, the requirement of 4 years of full-time research experience will apply. This equivalence should be strictly regarded as a specific objective of the Marie Curie actions (evaluation of research experience), and should not be regarded as conflicting with national rules in some Member States or Associated countries, which may recognise the equivalence of MD and PhD for other reasons (e.g. for career progression in the public sector).

Examples:

#### **Applicants eligible as experienced researchers**

A) A researcher who does not have a PhD but has worked full-time in research for the last 4 years after obtaining a university degree giving access to a doctorate prior to the deadline for proposal submission.

B) A researcher who was awarded a PhD 2 years prior to the call deadline but has not been working in research since.

#### **Applicants not eligible as experienced researchers**

A researcher who has 3 years and 9 months full time research experience and who expects to obtain a PhD 2 months after the deadline for proposal submission.

*If you are at an early stage of your career and do not have the level of experience that allows you to comply with one of the above criteria, you may still be eligible to participate in other Marie Curie actions directed at early-stage researchers. (See Marie Curie action Initial Training Networks (ITN))*

### 1.3.2 Mobility

*Experienced researchers* must comply with a series of conditions regarding nationality or residence and trans-national mobility.

*Experienced researchers* shall be considered eligible under this action if they are nationals of a Member State or Associated country. However researchers from Other Third Countries who have been residing and carrying out their main activity in Member States or Associated countries for at least the 5 years prior to the submission deadline are also eligible for this action.

#### Examples

***Applicants complying with the nationality rules:***

*An Indian national who has resided and worked continuously in France for the past 6 years may apply for a fellowship in Canada (outgoing phase) along with a mandatory return phase in any Member State or Associated country.*

***Applicant not complying with the nationality rules:***

*A Chinese national who has resided and worked in research in the UK during the last 4 years can not apply for an International Outgoing Fellowship.*

Researchers must comply with either of the mobility rules:

a) Mobility from a Member State or Associated country to an Other Third Country:

- ∅ *Experienced researchers* must move **from a Member State or Associated country to an Other Third Country**; additionally, at the time of the relevant deadline for submission of proposals, researchers must not have resided or carried out their main activity in the country of the *partner organisation* (the outgoing *host organisation*) for more than 12 months in the 3 years immediately prior to the deadline for submission of proposals.

b) Mobility related to International European interest Organisations or international organisations

- ∅ *Experienced researchers* can apply to any International European Interest Organisations or international organisations established in an Other Third Country; however, *experienced researchers* must not have spent more than 12 months in the same organisation in the 3 years immediately prior to the deadline for submission of proposals.

For the **outgoing phase**, *experienced researchers* must move from a Member State or Associated country to an Other Third Country.

**The mobility is toward an Other Third Country (outgoing phase) and the reintegration phase can be to any Member State/Associated country, including the *experienced researcher's* country of nationality or previous place of activity.**

Mobility is considered to be very positive for the development of a researcher. It allows the acquisition of new skills, new knowledge and new perspectives, all contributing to the enhancement of creativity, efficacy and performance, thereby contributing to career development and a successful, competitive, knowledge-based society. Mobility is, therefore, a central pillar of Marie Curie funding. It will be evaluated in the "Impact" criterion. Experienced researchers who apply for a Marie Curie International Outgoing Fellowship to extend their stays beyond the few months already spent at the host organisation will have to demonstrate clearly that the maximum benefit of their stays has not yet been achieved. It is very important that, in the proposal, the candidate clearly and effectively articulates the advantages of mobility as expressed through the Fellowship, to their

personal, research development. This will be assessed by independent evaluators during the evaluation phase as part of the overall benefit for the European Research Area.

Examples:

***Applicants complying with the mobility rules:***

*A) A Danish national who has always resided in Denmark may apply for a fellowship in Australia (outgoing phase) along with a mandatory return phase in any Member State or Associated country.*

*B) A Hungarian national who resides and works in Germany may apply for a fellowship in the United States (outgoing phase) along with a mandatory return phase in any Member State or Associated country.*

***Applicant not complying with the mobility rules:***

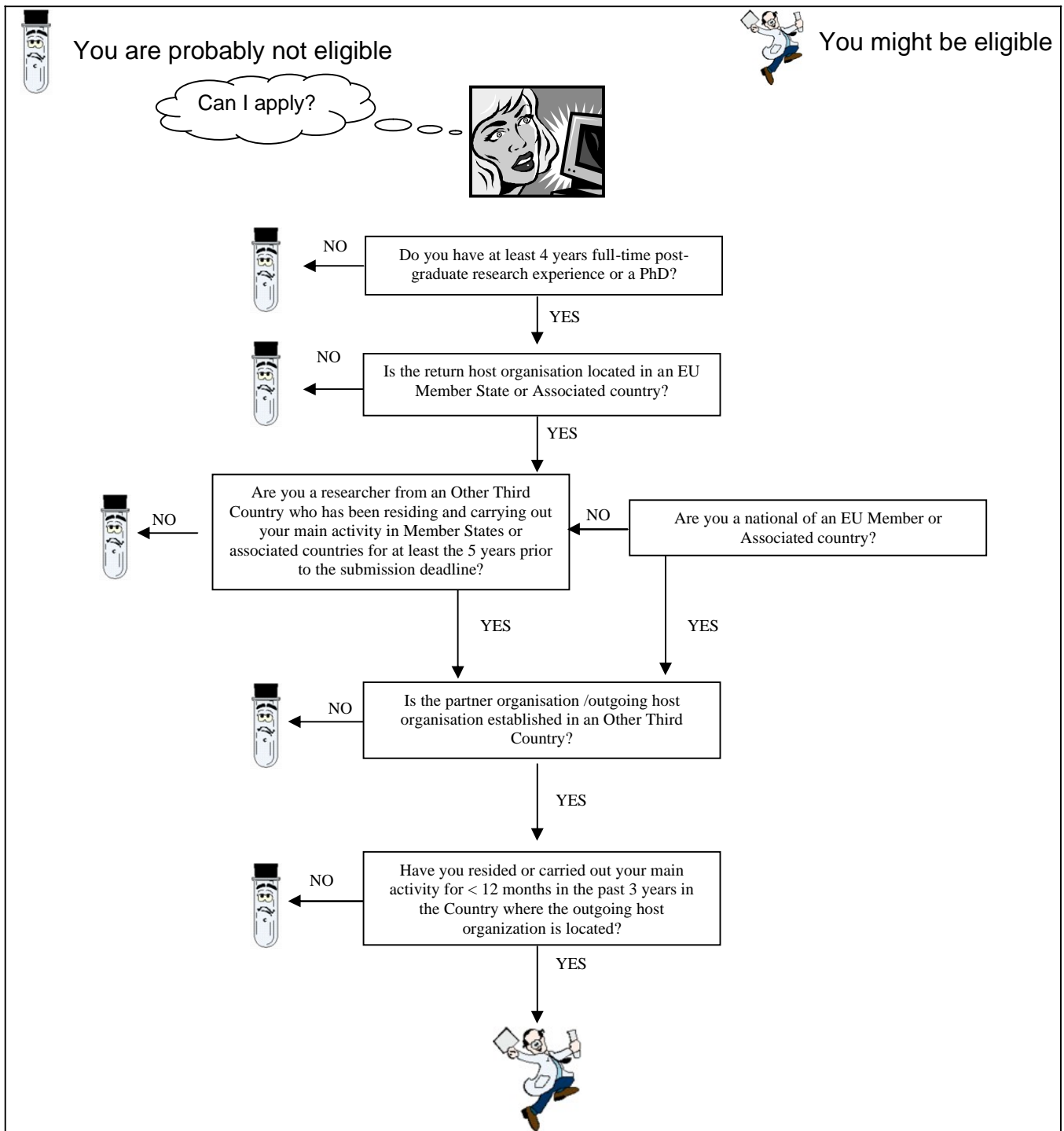
*An experienced researcher with British nationality who has been residing 16 months in South Africa during the last 3 years can not apply for an International Outgoing Fellowship with an outgoing phase in South Africa.*

### **1.3.3 Finding your way through the eligibility criteria**

To find your way through the eligibility criteria, the flowchart on the following page has been prepared. Please note that this chart is indicative only and you are always advised to check the text of the Work Programme.

# INDICATIVE CONDITIONS FOR ELIGIBILITY FOR AN IOF

In the following diagram, the conditions under which an *experienced researcher* may be eligible for a Marie Curie International Outgoing Fellowship are described.



## 1.4 Inviting Referees' Assessments of your Proposal

While the basis of the proposal evaluation is independent peer review by international experts, it is also possible, in the IOF call, to nominate up to three referees whose assessment can be read by the peer reviewers. These assessments are submitted by the referees directly to the REA and the procedure for doing so is explained in the Guide for Applicants (Common Part)

## 1.5 Typical Activities of an International Outgoing Fellowship for Career Development

### 1.5.1 Training activities

The main activities of an IOF will be based on a training-through-research project prepared by the *experienced researcher* in liaison with the *host organisation*. This project is tailored in order for the *experienced researcher* to reach a realistic and well-defined objective in terms of career advancement, for example strengthening or attaining a leading independent position, or resuming a research career after a break. The project will be shaped in order to develop and widen the competences of the *experienced researcher* significantly, in particular in terms of multi- or interdisciplinary expertise, inter-sectoral experience and complementary skills.

Such training activities might include:

- Primarily, training-through-research under supervision by means of an individual personalised project
- Hands-on training activities for developing scientific (new techniques or instruments, etc.) and complementary skills (proposal preparation to request funding, patent applications, project management, task coordination, technical staff supervision, etc.)
- Inter-sectoral or interdisciplinary transfer of knowledge
- Capacity to build collaborations;
- Taking active part in the research and financial management of the project
- Developing organisational skills through organisation of training or dissemination events.

A **Personal Career Development Plan** will be established by the *experienced researcher* and the scientist in charge prior to the start of the project in order to aid in the provision of the research training programme and research objectives that best suit the needs of the *experienced researcher*. This plan will act as a reference for the *experienced researcher* herself/himself to monitor the progress and take corrective action when necessary in order to attain the target set in terms of professional development. Models of personal career development plans can be found at: <http://ec.europa.eu/mariecurieactions>

### 1.5.2 Outreach Activities

In the Marie Curie Actions, Outreach Activities can be defined as dissemination initiatives directed towards the general public, rather than the research community. The primary goal of the Outreach Activities is to create awareness in the general public about the research work performed and its implications for the citizens. The outreach activities plan submitted by each applicant will be assessed during the evaluation of proposals. The type of outreach activities can be freely chosen by the applicants and could range from press articles to exposing students from primary and secondary schools or universities to science, research and innovation in order to develop their motivation to embrace research careers.

## 1.6 Financial Regime

The conditions for funding the activities undertaken by the *experienced researcher* in order to attain the project deliverables are defined in the Work Programme. The contribution relates to the costs of the Fellowship and directly related costs only. The *host organisation* must cover all other costs connected to hosting the *fellow* and related to the implementation of the project.

### 1.6.1 What types of expenses are covered?

The financial support for International Outgoing Fellowships takes the form of a grant covering up to 100% of the budget, according to a system of flat rates for eligible cost categories, comprising the following components:

- a monthly living allowance :

This refers to the basic monthly amount to be paid to the *experienced researcher* according to Table 3.1 in Annex 3 of the *Work Programme*. This is then adjusted, applying a correction factor for the cost of living according to the country in which s/he will be appointed, as shown in Table 3.2 in Annex 3 of the *Work Programme*.

**As a general rule *experienced researchers* must be appointed under an employment contract** except in adequately documented cases or where national regulation would prohibit this possibility. When an employment contract cannot be provided, the *experienced researcher* must be recruited under a status equivalent to a fixed amount fellowship, provided that it is compatible with the national legislation and that adequate social security is provided (but not necessarily paid from the fellowship).

As a general principle the choice of appointment type should be made in accordance with the best interests of the *experienced researcher*. The European Charter for Researchers and the Code of Conduct for the recruitment of researchers offer a reference framework for the employment of researchers.

In all cases, *host organisations* must ensure that the *experienced researcher* is covered under the social security scheme which is applied to employed workers within the country of the contractor, or under a social security scheme providing adequate protection and covering the *experienced researcher* in every place of implementation of the IOF activities.

The living allowance is a gross European Union contribution to the salary costs of the *fellow*. Consequently, the net salary results from deducting all compulsory social security contributions (employee's contribution and employer's contribution, where applicable) as well as direct taxes (e.g. income tax) from the gross amounts.

*Social security contributions and taxation vary from country to country. In order to obtain an estimate of the actual net allowances for the experienced researchers, it is recommended to consult the host organisation and/or the relevant National Contact Point (see Annex 1 for address with the list of National Contact Points).*

The *host organisation* may pay a **top-up** to the eligible *experienced researchers* but the *experienced researcher's* salary may not be below the fellowship amount provided by the European Union.

- a monthly mobility allowance

This is a monthly payment of a flat rate contribution to cover expenses related to the mobility (relocation, family expenses, language courses, travel expenses etc.). As for the living allowance, a correction factor for the cost of living of the country of execution of the project is applied (see Table 3.2 in Annex 3 of the *Work Programme*). There are two reference amounts

depending on the family situation of the *experienced researcher* at the time of the relevant deadline for submission of proposals:

- €1000/month: *experienced researcher* with family obligations. 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) dependent children who are actually being maintained by the researcher.
- €700/month: *experienced researcher* without family obligations.
- a contribution to the training expenses of the eligible *experienced researcher*

This contribution is managed by the *host organisation* for expenses related to the participation of the *experienced researcher* in research and training activities. In principle **all** costs related to the successful execution of the project by the *fellow* (e.g. *purchase of consumables, participation in conferences and training courses, fees for scientific journals, memberships of scientific associations etc.*), and which would normally not arise if the *fellow* was not hosted at the *host organisation*, are eligible. This contribution consists of a flat rate:

  - €800 per researcher-month
- Contribution to overheads:

Flat rate of €700 per researcher-month, to which the correction factor for the cost of living as referred to in Table 3.2 of Annex 3 of the Work Programme, is applied.

**The maximum amount of the grant will be fixed in the *grant agreement* after the negotiation phase.**

### **1.6.2 How do I estimate the European Union contribution?**

Applicants are not required to calculate the amount of the estimated European Union contribution. This will be automatically calculated from the information contained in the A4 proposal submission form of the proposal, using the rates, allowances and coefficients given in Annex 3 of the *Work Programme*. If the proposal is selected for funding, the European Union contribution will be calculated more accurately during the negotiations taking into account any recommendations made by the independent evaluators.

The example below aims to help understand the way the contributions are calculated.

Example: An *experienced researcher* with 6 years experience and family charges, going from Lisbon (where s/he has always resided and worked) to Harvard, Boston (USA) for a 2 year outgoing phase and a 1 year re-integration phase in Lisbon with an Outgoing International Fellowship under an employment contract and with location of origin in Portugal.

**EXPENSES FOR THE ACTIVITIES CARRIED OUT BY THE EXPERIENCED RESEARCHER** (all are part of the direct costs mentioned in Annex 3 of the Work Programme):

#### Outgoing Phase

- Living allowance: € 58,500 x 2 years = € 117,000
- Mobility allowance: € 1000 x 24 months = € 24,000
- Training expenses: € 800 x 24 months = € 19,200

*Correction factor for USA = 101.3%*

*(Total Living allowance + Mobility allowance) x Correction factor for the USA + Training expenses = € 162,033*

Re-integration Phase

- Living allowance: € 58,500 x 1 years = € 58,500
- Mobility allowance: € 1000 x 12 months = € 12,000
- Training expenses: € 800 x 12 months = € 9,600

*Correction factor for Portugal = 87.8%*

*(Total Living allowance + Total Mobility allowance) x Correction factor for Portugal + Training expenses = € 71,499*

Note that these amounts represent the EU contributions to salary costs and as such include compulsory social security contributions and income tax, if relevant, both for the employer and the employee. This amount is not the gross salary of the researcher, but the total cost for the employer (who is free to pay a top-up if this has been negotiated).

***European Union Contribution for experienced researcher (gross): € 233,532***

**Contribution to the participation expenses of eligible experienced researchers (managed by the host organisation)**

Outgoing Phase

- Contribution to overheads: € 700 x 24 = € 16,800

*Correction factor for USA = 101.3 %  
(Total contribution to overheads) x Correction factor for the USA = € 16,800 x 101.3% = €17,018.40*

Re-integration Phase

- Contribution to overheads: € 700 x 12 = € 8,400  
*Correction factor for Portugal = 87.8%  
(Total contribution to overheads) x Correction factor for Portugal = € 8,400 x 87.8% = € 7,375.20*

*Total contribution to overheads: € 17,018.40 + € 7,375.20 = € 24,393.60*

*Total European Union Contribution = € 233,532 + € 24,393.60 = € 257,925.60*

**Total Maximum European Union Contribution: € 257,925.60**

In summary:

Contribution	Budget (€)
Contribution for the benefit of the <i>experienced researcher</i>	233,532.00
Contribution to overheads	24,393.60
<b>Total maximum EU contribution</b>	<b>257,925.60</b>

## 1.7 The Project Phase

Successful proposals will be invited to enter into negotiation with the REA. On the basis of the information provided in the proposal (particularly part A of the proposal) and the recommendation by the independent experts, a "*grant agreement*" will be then prepared and sent to the *host organisation* ("*beneficiary*"). The partner organisation does not sign any grant agreement with the REA. The partner organisation signs a partnership agreement with the host organisation (beneficiary). The *grant agreement* should be signed in duplicate by the *host organisation* and returned to the REA for signature. In addition, the *host organisation* signs an agreement<sup>2</sup> with the selected *experienced researcher* in line with the provisions of the *grant agreement*. The signature of the employment contract and the start of the project will normally take place after the *grant agreement* enters into force, i.e. after its signature by the REA.

**The accomplishment of a reintegration phase for the *fellow* in the European host organisation is fundamental for a successful achievement of the objectives of this action.** In the *grant agreement* between the return host organisation and the REA it is therefore clearly stressed that the *fellow* has to undertake a **mandatory period of re-integration** at the *host organisation* following the outgoing phase. **In case of non-fulfilment of this condition**, the *host organisation* has to reimburse the total amount received from the REA for the benefit of the *experienced researcher* under this grant agreement. The *grant agreement* also stipulates that in case the responsibility for non-fulfilment of the return clause lies with the *fellow*, the host organisation **must take all appropriate measures (including legal action) to recover from the *fellow* the total amount received** for his/her benefit under the *grant agreement*, in order to reimburse this amount to the REA.

### 1.7.1 Key aspects of the host organisation - experienced researcher agreement

The agreement between the *host organisation* and the *experienced researcher* must determine, in accordance with the *grant agreement*, the conditions for implementing the research training activities and the respective rights and obligations of the *experienced researcher* and the *host organisation*. It must indicate the amounts that s/he is entitled to receive, the conditions of implementation of the project, the law applicable, IPR arrangements and social security coverage among other issues. The requirements to be respected are included in Annex III (Specific provisions) of the *grant agreement*, which should be annexed to the agreement. **Experienced researchers are strongly encouraged to read these provisions carefully and check that their agreements comply with the rules.** A copy of the model *grant agreement* is available from [CORDIS](http://cordis.europa.eu). Further information and assistance is available on the EURAXESS webpage: <http://ec.europa.eu/euraxess>.

The actual fellowship must not start until the agreement between the *fellow* and the *host organisation* is in place. This means that neither the REA nor the *host organisation* are under any obligation to make any payments to *fellows* who unilaterally decide to start at an earlier date from that established in the agreement, and that *fellows* who take such steps do so at their own risk.

Annexed to the agreement there shall be a Personal Career Development Plan that should have been previously established by the *fellow* and his/her supervisor. This Plan comprises the *fellow's* training needs and scientific objectives as well as a description of all activities foreseen as part of

---

<sup>2</sup> As a general rule researchers must be appointed under an employment contract except in adequately documented cases or where national regulation would prohibit this possibility. When an employment contract cannot be provided, the experienced researcher must be recruited under a status equivalent to a fixed amount fellowship, provided that it is compatible with the national legislation and that adequate social security is provided (but not necessarily paid from the fellowship).

the fellowship specific training/career development programme at the host. This Personal Career Development Plan will be part of the follow up at the different reporting stages.

### **1.7.2 Project suspension**

The REA must be informed immediately of interruptions of *fellows'* stays and appropriate justifications should be provided. Split stays provided for in Annex I of the *grant agreement* and integrated in the work plan are deemed to be approved by the REA.

In case the fellow wants to suspend the execution of the project for personal, family or professional reasons unforeseen at the time of the signature of the *grant agreement*, a request for suspension should be submitted to the REA. The REA will not object to any requests for suspension when the *fellow* is entitled to maternity/parental leave established either by national law or internal rules of the *host organisation*. In all other cases, the REA's approval of such requests will depend on the justifications provided and the impact expected on the execution of the project

### **1.7.3 Part-time work**

In principle, *fellows* must work full-time on their training project. Exceptionally, part-time work can be accepted for personal or family reasons subject to prior approval by the REA. In such a case, the allowances will be adapted *pro rata* to the time actually spent on the project. Under no circumstances can the total contribution of the Union as indicated in the *grant agreement* be exceeded.

### **1.7.4 Stays away from the host organisation's premises**

As a general rule, the project must take place at the *host organisation* premises. However, in some cases, stays away may be justified as part of collaborations or as part of the training.

The responsible REA project officer should be informed of any period of stay away from the *host organisation's* premises which exceeds one month. In any case, *fellows* may not stay more than 30% of the duration of the fellowship away from the *host organisation's* premises unless such stays **have been explicitly provided for in the original proposal and in the *grant agreement*.**

## Annexes

- Annex 1 Timetable and specific information for this call
- Annex 2 Evaluation criteria and procedure
- Annex 3 Instructions for completing "part A" of the proposal
- Annex 4 Instructions for drafting "part B" of the proposal

## Annex 1 – Timetable and specific information for this call

- The "**People**" **Work Programme** provides the essential information for submitting a proposal to this call. It describes the content of the topics to be addressed, and details on how it will be implemented. The Work Programme is available on the CORDIS call page (see <http://cordis.europa.eu/fp7/dc/index.cfm> ). The part giving the basic data on implementation (deadline, budget, deadlines, special conditions etc) is also posted as a separate document ("call fiche"). You must consult these documents.
- **Indicative timetable for this call**

Publication of call	<b>16 March 2011</b>
Deadline for submission of proposals	<b>11 August 2011 at 17.00.00 Brussels local time</b>
Evaluation of proposals	<b>3-21 October 2011</b>
Evaluation Summary Reports sent to proposal coordinators ("initial information letter")	<b>End of November 2011</b>
Invitation letter to successful coordinators to launch <i>grant agreement</i> negotiations with the REA services	<b>December 2011</b>
Letter to unsuccessful applicants	<b>From December 2011</b>
Signature of first <i>grant agreements</i>	<b>From March 2012</b>

- **Further information and help**

The CORDIS call page: <http://cordis.europa.eu/fp7/dc/index.cfm> contains links to other sources that you may find useful in preparing and submitting your proposal. Direct links are also given where applicable.

**Call information:** CORDIS call page and Work Programme: <http://cordis.europa.eu/fp7/dc/index.cfm>

**General sources of help:** The Commission's FP7 Enquiry service: <http://ec.europa.eu/research/index.cfm?pg=enquiries>

National Contact Points: [http://cordis.europa.eu/fp7/ncp\\_en.html](http://cordis.europa.eu/fp7/ncp_en.html)

**Specialised and technical assistance**

CORDIS help desk: [http://cordis.europa.eu/guidance/helpdesk/home\\_en.html](http://cordis.europa.eu/guidance/helpdesk/home_en.html)

EPSS help desk: [support@epss-fp7.org](mailto:support@epss-fp7.org)

IPR help desk: <http://www.ipr-helpdesk.org/index.html>

**Legal documents generally applicable:** ([http://cordis.europa.eu/fp7/find-doc\\_en.html](http://cordis.europa.eu/fp7/find-doc_en.html))

**Decision on the Framework Programme:** Decision No 1982/2006/EC of the European Parliament and of the Council of 18 December 2006 concerning the Seventh Framework Programme of the European Community for research, technological development and demonstration activities (2007-2013), available in all Community languages.

**Rules for Participation:** Regulation (EC) No 1906/2006 of the European Parliament and of the Council of 18 December 2006 laying down the rules for the participation of undertakings, research centres and universities in actions under the Seventh Framework Programme and for the dissemination of research results (2007-2013)), available at: [http://ec.europa.eu/research/fp7/index\\_en.cfm?pg=documents](http://ec.europa.eu/research/fp7/index_en.cfm?pg=documents)

**People Specific Programme:** Council Decision No 2006/973 concerning the specific programme 'People' implementing the Seventh Framework Programme of the European Community for research, technological development and demonstration activities (2007 to 2013) [http://cordis.europa.eu/fp7/home\\_en.html](http://cordis.europa.eu/fp7/home_en.html)

**Rules for proposal submission of proposal, and the related evaluation selection and award procedures:** [http://cordis.europa.eu/fp7/participate\\_en.html](http://cordis.europa.eu/fp7/participate_en.html)

#### **Other supporting information**

Brochure "The FP7 in Brief" can be downloaded from the Europa web site at:

[http://ec.europa.eu/research/fp7/pdf/fp7-inbrief\\_en.pdf](http://ec.europa.eu/research/fp7/pdf/fp7-inbrief_en.pdf)

The **European Charter for Researchers** and the **Code of Conduct** for their recruitment can be downloaded from: [http://ec.europa.eu/eracareers/pdf/am509774CEE\\_EN\\_E4.pdf](http://ec.europa.eu/eracareers/pdf/am509774CEE_EN_E4.pdf)

**International cooperation** on CORDIS at: <http://cordis.europa.eu/inco/>

#### **Ethics**

This Guide should be read in conjunction with the Guide for Applicants (Ethics). A dedicated website that aims to provide clear, helpful information on ethics issues is available at:

[http://cordis.europa.eu/fp7/ethics\\_en.html](http://cordis.europa.eu/fp7/ethics_en.html)

## Annex 2 – Evaluation criteria and procedures to be applied for this call

### 1. General

The evaluation of proposals is carried out by the REA with the assistance of independent experts.

REA staff ensure that the process is fair, and in line with the principles contained in the Commission's rules<sup>3</sup>.

Experts perform evaluations on a personal basis, not as representatives of their employer, their country or any other entity. They are expected to be independent, impartial and objective, and to behave throughout in a professional manner. They sign an appointment letter, including an agreement of non-disclosure/confidentiality and conflict of interest before beginning their work. These rules must be adhered to at all times, before, during and after the evaluation.

Conflicts of interest: Under the terms of their appointment letter, experts must disclose beforehand any known conflicts of interest, and must immediately inform an REA staff member if one becomes apparent during the course of the evaluation. The REA will take whatever action is necessary to remove any conflict.

Non-disclosure/Confidentiality: The appointment letter also requires experts to maintain strict confidentiality with respect to the whole evaluation process. They must follow any instruction given by the REA to ensure this. Under no circumstance may an expert attempt to contact an applicant on his/her own account, either during the evaluation or afterwards.

In addition, independent observers will be appointed by the REA to observe the evaluation process from the point of view of its working and execution. The role of the observer is to give independent advice to the REA on the conduct and fairness of the evaluation sessions, as well as on possible improvements to the evaluation procedures. The observer will not express views on the proposals under examination or the opinions of the experts on the proposals.

### 2. Before the evaluation

On receipt by the REA, proposals are registered and acknowledged and their contents entered into a database to support the evaluation process. Eligibility criteria for each proposal are checked before the evaluation begins. Proposals which do not fulfil these criteria will not be included in the evaluation. For this call a proposal will only be considered eligible if it meets all of the following conditions:

- It is received by the REA before the deadline given in the call fiche
- It is complete (i.e. both the requested administrative forms and the proposal description are present)
- The other eligibility conditions described above, for example the rule for mobility, are satisfied.

Where a maximum number of pages has been indicated for a section of the proposal, or for the proposal as a whole, the experts will be instructed to disregard any excess pages.

---

<sup>3</sup> Rules for proposal submission of proposal, and the related evaluation selection and award procedures, available on CORDIS.

The REA establishes a list of experts capable of evaluating the proposals that have been received. The list is drawn up to ensure:

- A high level of expertise
- An appropriate range of competencies.

Provided that the above conditions can be satisfied, other factors are also taken into consideration:

- An appropriate balance between academic and industrial expertise and users
- A reasonable gender balance
- A reasonable distribution of geographical origin
- Regular rotation of experts.

In constructing the lists of experts, the REA also takes account of their abilities to appreciate the industrial and/or societal dimension of the proposed work. Experts must also have the appropriate language skills required for the proposals to be evaluated.

REA staff allocate proposals to individual experts, taking account of the fields of expertise of the experts, and avoiding conflicts of interest.

### 3. Individual evaluation of proposals

At the beginning of the evaluation, experts will be briefed by REA staff, covering the evaluation procedure, the experts' responsibilities, the issues involved in the particular area/objective, and other relevant material.

Each proposal will first be assessed independently by at least three experts, chosen by the REA from the pool of experts taking part in this evaluation, against the following criteria:

S&T Quality (award)	Training (award)	Researcher (award)	Implementation (selection)	Impact (award)
Research/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 transferable skills training *
Appropriateness of research methodology and approach	Relevance and quality of additional research training, as well as transferable 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 research 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 other 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 research 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		Impact of the proposed outreach activities *

\* Sub-criteria to be evaluated in the light of the principles of the 'European Charter for Researchers' and the 'Code of Conduct for the Recruitment of Researchers'.

Evaluation scores will be given for each of the five criteria, and not for the sub-criteria. The sub-criteria are issues that the expert should consider in the assessment of the relevant criterion. They also act as reminders of issues to be raised later during the discussions of the proposal.

Each criterion will be scored out of 5. Scores will be given with a resolution of one decimal place. The scores indicate the following with respect to the criterion under examination:

- 0- The proposal fails to address the criterion under examination or cannot be judged due to missing or incomplete information
- 1- Poor. The criterion is addressed in an inadequate manner, or there are serious inherent weaknesses.
- 2- Fair. While the proposal broadly addresses the criterion, there are significant weaknesses.
- 3- Good. The proposal addresses the criterion well, although improvements would be necessary.
- 4- Very Good. The proposal addresses the criterion very well, although certain improvements are still possible.
- 5- Excellent. The proposal successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor.

The IOF thresholds and weightings for the different criteria are summarized in the table below:

<b>Evaluation Criterion</b>	<b>Weighting (in %)</b>	<b>Threshold</b>	<b>Priority in case of ex aequo</b>
S&T Quality	25	3	3
Training	15	3	2
Researcher	25	4	1
Implementation	15 <sup>4</sup>	N/A	5
Impact	20	3.5	4

In addition to the individual thresholds for the first three criteria, an overall threshold of 70% will be applied to the total weighted score.

At this first step the experts are acting individually; they do not discuss the proposal with each other, nor with any third party. The experts record their individual opinions in an Individual Assessment Report (IAR), giving scores and also comments against the evaluation criteria.

When scoring proposals, experts will *only* apply the above evaluation criteria.

Experts will assess and mark the proposal exactly as it is described and presented. They do not make any assumptions or interpretations about the project in addition to what is in the proposal.

Concise but explicit justifications will be given for each score. Recommendations for improvements to be discussed as part of a possible negotiation phase will be given to the REA, if needed.

The experts will also indicate whether, in their view, the proposal deals with sensitive ethics issues, please see the Guide for Applicants (Ethics). Please note that if there are ethics issue in a proposal this does not necessarily mean it will not be funded, it is up to a separate ethics issues committee to check whether the issues have been properly addressed.

Signature of the IAR also entails a declaration that the expert has no conflict of interest in evaluating the particular proposal.

Scope of the call: It is possible that a proposal is found to be completely out of scope of the call during the course of the individual evaluation, and therefore not relevant. If an expert suspects that

<sup>4</sup> Split where appropriate between the 3rd country institution and the European host

this may be the case, an REA staff member will be informed immediately, and the views of the other experts will be sought.

If the consensus view is that the main part of the proposal is not relevant to the topics of the call, the proposal will be withdrawn from the evaluation, and the proposal will be deemed ineligible.

## 4. Consensus meeting

Once all the experts to whom a proposal has been assigned have completed their IAR, the evaluation progresses to a consensus assessment, representing their common views. This entails a consensus meeting to discuss the scores awarded and to prepare comments.

The consensus discussion may be moderated by a representative of the REA. The role of the moderator is to seek to arrive at a consensus between the individual views of experts without any prejudice for or against particular proposals or the organisations involved, and to ensure a confidential, fair and equitable evaluation of each proposal according to the required evaluation criteria.

The moderator for the group may designate an expert to be responsible for drafting the consensus report ("Rapporteur"). The experts attempt to agree on a consensus score for each of the criteria that have been evaluated and suitable comments to justify the scores. Comments should be suitable for feedback to the proposal coordinator. Scores and comments are set out in a consensus report. They also come to a common view on the questions of scope and ethics.

If during the consensus discussion it is found to be impossible to bring all the experts to a common point of view on any particular aspect of the proposal, the REA may ask up to three additional experts to examine the proposal.

### Ethics issues (above threshold proposals)

If one or more experts have noted that there are ethics issues touched on by the proposal, and the proposal is considered to be above threshold, the relevant box on the consensus report (CR) will be ticked and an Ethics Issues Report (EIR) completed, stating the nature of the ethics issues. Exceptionally for this issue, no consensus is required.

The EIR will be signed by an REA moderator and one member of the consensus group (normally, the proposal Rapporteur). Following the evaluation, The REA will submit all proposals in the funding range and for which ethics issues have been flagged (either by the applicant and/or by the experts during the evaluation) to a specific ethics review screening. A specific EIR will be filled in by the ethics experts and forwarded to the beneficiaries during the negotiation. Requirements in the report will be regarded as contractual obligations and will have to be fulfilled before the negotiation of a grant agreement can be completed. Furthermore, for projects raising specific ethics issues such as research intervention on human beings; research on human embryos and human embryonic stem cells and non-human primates, an in-depth ethics review will be automatically carried out by the Commission's services. For more detail please refer to the Guide for Applicants (Ethics)

### Outcome of consensus

The outcome of the consensus step is the consensus report. This will be signed (either on paper, or electronically) by all experts, or as a minimum, by the Rapporteur and the moderator. The moderator is responsible for ensuring that the consensus report reflects the consensus reached, expressed in scores and comments. In the case that it is impossible to reach a consensus, the report sets out the majority view of the experts but also records any dissenting views.

The REA will take the necessary steps to ensure the quality of the consensus reports, with particular attention given to clarity, consistency, and appropriate level of detail. If important changes are necessary, the reports will be referred back to the experts concerned.

The signing of the consensus report completes the consensus step.

#### Evaluation of a resubmitted proposal

In the case of proposals that have been submitted previously to the Commission or the REA, the moderator gives the experts the previous evaluation summary report (see below) only at the consensus stage and after a consensus has been achieved between the experts. The experts will be required to provide a clear justification for their scores and comments should these differ markedly from those awarded to the earlier proposal.

## 5. Panel review

This is the final step involving the independent experts. It allows them to formulate their recommendations to the REA having had an overview of the results of the consensus step. The main task of the panel is to establish a ranked list of the proposals which passed all evaluation thresholds. The panels are organised according to the research disciplines and comprise experts involved at the consensus step.

The tasks of the panel will also include:

- *reviewing cases where a minority view was recorded in the consensus report*
- *recommending a priority order for proposals with the same consensus score in all subcriteria.*

The panel is moderated by the chair. The REA will ensure fair and equal treatment of the proposals in the panel discussions. A panel Rapporteur will be appointed to draft the panel's advice.

The outcome of the panel meeting is a report recording, principally:

- *An evaluation summary report (ESR) for each proposal, including, where relevant, a report of any ethics issues raised and any security considerations*
- *A list of proposals passing all thresholds, along with a final score for each proposal passing the thresholds and the panel recommendations for priority order*
- *A list of evaluated proposals having failed one or more thresholds*
- *A list of any proposals having been found ineligible during the evaluation by experts*
- *A summary of any deliberations of the panel.*

The panel report is signed by at least three panel experts, including the panel Rapporteur and the chairperson. A further special ethics review of above-threshold proposals may be organised by the REA

## Annex 3 - Instructions for completing "part A" of the proposal

Proposals in this call must be submitted electronically, using the REA's Electronic Proposal Submission System.

In part A you will be asked for certain administrative details that will be used in the evaluation and further processing of your proposal. Part A forms an integral part of your proposal. Details of the work you intend to carry out will be described in part B (Annex 4).

Section A1 gives a snapshot of your proposal, section A2 concerns the *host organisation*, section A3 gives details of the researcher, while section A4 deals with financial matters.

### How to complete the forms (A1 to A4)?

When you complete part A, please make sure that:

- *Numbers are always rounded to the nearest whole number*
- *All costs are given in Euros (not thousands of Euros), and must exclude value added tax.*

**Note: The eligibility will be performed on the information provided in the Part A of the proposal. Furthermore in case of any important incoherence or inconsistency between part A and part B, the REA may also consider the proposal ineligible and it will not be evaluated. All fields must be filled.**

**Note: The following notes are for information only. They should assist you in completing part A of your proposal. On-line guidance will also be available. The precise questions and options presented on EPSS may differ slightly from these below.**

<b>Section A1 – Information on the Proposal</b>	
<b>Proposal number</b>	[pre-filled]
<b>Proposal Acronym</b>	The short title or acronym will be used to identify your proposal efficiently in this call. It should be of <u>no more than 20 characters</u> (use standard alphabet and numbers only; no symbols or special characters please). The same acronym should appear on each page of part B of your proposal.
<b>Proposal Title</b>	The title should be <u>no longer than 200 characters</u> and should be understandable to the non-specialist in your field.
<b>Marie Curie Action code</b>	This field will be pre-filled with the code corresponding to the action of the call: Initial Training Networks ( <b>ITN</b> ) Industry-Academia Partnerships and Pathways ( <b>IAPP</b> ) Co-funding of Regional, National and International Programmes ( <b>COFUND</b> ) Intra-European Fellowships ( <b>IEF</b> ) Career Integration Grants ( <b>CIG</b> ) <b>International Outgoing Fellowships (IOF)</b> International Incoming Fellowships ( <b>IIF</b> ) Marie Curie International Research Staff Exchange Scheme ( <b>IRSES</b> )
<b>Evaluation Panel</b>	Please choose a code from the list below indicating the main research area of relevance to your proposal. This information will help the REA in the organisation of the evaluation of proposals. Chemistry <b>CHE</b> Social and Human Sciences <b>SOC</b> Economic Sciences <b>ECO</b> Information science and Engineering <b>ENG</b> Environment and geosciences <b>ENV</b> Life sciences <b>LIF</b> Mathematics <b>MAT</b> Physics <b>PHY</b>  * To help you select the most relevant panel code please refer also the breakdown of each research area into a number of sub-disciplines at the end of this section.
<b>Total Duration in months</b>	Insert the estimated duration of the project in full months: between 24 and 36 months only.
<b>Call identifier</b>	[pre-filled] The call identifier is the reference number given in the call or part of the call you are addressing, as indicated in the publication of the call in the Official Journal of the European Union, and on the CORDIS call page. A call identifier looks like this: <i>FP7-PEOPLE-IOF-20XX</i> .
<b>Keywords</b>	Please enter a number of keywords that you consider sufficient to characterise the scope of your proposal. There is <u>a limit of 200 characters</u> . Please select at least two keywords from the drop-down list and/or add free keywords.
<b>Abstract</b>	The abstract should, at a glance, provide the reader with a clear understanding of the objectives of the proposal, how they will be achieved, and their relevance to the Work Programme. This summary will be used as the short description of the proposal in the evaluation process and in communications to the programme management committees and other interested parties. It must therefore be short and precise and should not contain confidential information. Please use plain typed text, avoiding formulae and other special characters. There is <u>a limit of 2000 characters</u> .
<b>Similar proposals</b>	A 'similar' proposal or contract is one that differs from the current one in minor ways.
<b>Ethics Issues in Part B</b>	Please choose YES or NO on the following basis: In the Part B Proposal Description you are asked to describe any ethics issues that may arise in your proposal and to fill in the table "RESEARCH ETHICS ISSUES". If your proposal involves any of the sensitive ethics issues detailed in the table, please choose YES in this field. If not, choose 'NO'. This information will be used by the REA to flag proposals with potential ethics issues that need further follow-up (but not necessarily a formal ethics review).

## Evaluation Panels - Sub-disciplines

To help you in selecting the most relevant panel code please find below a breakdown of each research area:

### CHEMISTRY (CHE)

- Biological, Pharmaceutical and Medicinal Chemistry
- Environmental Chemistry
- Homogeneous and Heterogeneous Catalysis
- Instrumental Techniques, Analysis, Sensors
- Molecular Aspects of New Materials, Macromolecules, Supramolecular Structures, Nanochemistry
- New Synthesis, Combinatorial Chemistry
- Reaction Mechanisms and Dynamics
- Surface Science and Colloids
- Theoretical and Computational chemistry
- Other Chemistry

### SOCIAL & HUMAN SCIENCES (SOC)

- Education and Training
- Law (European or Comparative National)
- Linguistics (applied to: Education, Industrial Efficiency or Social Cohesion)
- Media and Mass Communication
- Political Sciences (European or Comparative National)
- Psychology (Social, Industrial, Labour, or Education)
- Sociology
- Other Social and Human Sciences

### ECONOMIC SCIENCES (ECO)

- Financial Sciences
- Industrial Economics (incl. Technology & Innovation)
- International Economics
- Labour Economics
- Macroeconomics
- Management of Enterprises (incl. Marketing)
- Microeconomics
- Natural Resources & Environmental Economics
- Public Sector Economics
- Quantitative Methods
- Research Management
- Social Economics
- Urban & Regional Economics (incl. Transport Economics)
- Other Economic Sciences

### ENGINEERING & INFORMATION SCIENCE (ENG)

- Automation, Computer Hardware, Robotics
- Bioengineering
- Chemical Engineering
- Civil Engineering
- Computer Graphics, Human Computer Interaction, Multimedia
- Electrical Engineering
- Electronics
- Information Systems, Software Development and Databases
- Knowledge Engineering and Artificial Intelligence
- Materials Engineering
- Mechanical Engineering
- Parallel and Distributed Computing, Computer Architecture
- Signals, Speech and Image Processing
- Systems, Control, Modelling & Neural Networks
- Telecommunications
- Transport Engineering
- Other Engineering and Information Science

### ENVIRONMENT & GEOSCIENCES (ENV)

- Agriculture, Agro industry and Forestry
- Biodiversity and Conservation
- Climatology, Climate Change, Meteorology and Atmospheric Processes
- Ecology and Evolution (incl. Population Biology)
- Environmental Engineering and Geotechnics
- Fisheries and Aquaculture
- Geochemistry and Mineral Sciences
- Geophysics, Tectonics, Seismology, Volcanology
- Marine Sciences
- Natural Resources Exploration and Exploitation

- Physical Geography, Earth Observation and Remote Sensing
- Pollution, Waste Disposal and Ecotoxicology
- Soil and Water Processes
- Stratigraphy, Sedimentary Processes and Palaeontology
- Other Environment and Geosciences

### **LIFE SCIENCES (LIF)**

- Bioenergetics
- Biological Membranes
- Biomedicine, Public Health & Epidemiology
- Cancer Research
- Cell Biology
- Computational Biology and Bioinformatics
- Developmental Biology
- Enzymology
- Genetic Engineering
- Genomics and General Genetics
- Immunology
- Macromolecular Structures and Molecular Biophysics
- Medical Pathology
- Metabolic Regulation and Signal Transduction
- Metabolism of Cellular Macromolecules
- Microbiology and Parasitology
- Neurosciences (incl. Psychiatry and Clinical Psychology)
- Pharmacology and Toxicology
- Physiology
- Virology
- Other Life Sciences

### **MATHEMATICS (MAT)**

- Algebra and Number Theory
- Algorithms and Complexity
- Analysis and Partial Differential Equations
- Applied Mathematics and Mathematical Physics
- Discrete Mathematics and Computational Mathematics
- Geometry and Topology
- Logic and Semantics
- Statistics and Probability
- Other Mathematics

### **PHYSICS (PHY)**

- Astronomy, Astrophysics and Cosmology
- Atomic and Molecular Physics
- Biophysics and Medical Physics
- Condensed Matter- Electronic Structures, Electrical and Magnetic Properties
- Condensed Matter- Mechanical and Thermal Properties
- Condensed Matter- Optical and Dielectric Properties
- Elementary Particles and Fields
- Fluids and Gases
- Non Linear Dynamics and Chaos Theory
- Nuclear Physics
- Optics and Electromagnetism
- Physical Chemistry, Soft Matter and Polymer Physics
- Physics of Superconductors
- Plasmas and Electric Discharges
- Statistical Physics and Thermodynamics
- Surface Physics
- Other Physics

<b>Section A2 – Information on the Host organisations:</b>	
<b>Participant number</b>	The number allocated to the participant for this proposal. In proposals with only one participant, the single participant is always number one. In proposals that have several participants, the co-ordinator of a proposal is always number one. The host institution in the European Union or in an Associated country is always participant <b>number one</b> and the partner institution in an Other Third Country is <b>number two</b>
<b>Participant identification code</b>	The Participant Identification Code (PIC) will enable organisations to take advantage of the Unique Registration Facility. Organisations who have received a PIC from the REA are encouraged to use it when submitting proposals. Check the following web link to retrieve your PIC number ( <a href="http://cordis.europa.eu/fp7/urf-pic_en.html">http://cordis.europa.eu/fp7/urf-pic_en.html</a> ). By entering a PIC, parts of section A2 will be filled in automatically.
<b>Legal name</b>	<b>For a Public Law Body</b> , it is the name under which your organisation is registered in the Resolution text, Law, Decree/Decision establishing the Public Entity, or in any other document established at the constitution of the Public Law Body; <b>For a Private Law Body</b> , it is the name under which your organisation is registered in the national Official Journal (or equivalent) or in the national company register. <b>For a natural person</b> , it is for e.g. Mr Adam JOHNSON, Mrs Anna KUZARA, and Ms Alicia DUPONT
<b>Organisation Short Name</b>	Choose an abbreviation of your Organisation Legal Name, only for use in this proposal and in all related documents. This short name should not be more <u>than 20 characters</u> exclusive of special characters e.g. CNRS and not C.N.R.S. It should be preferably the one as commonly used, for e.g. IBM and not Int.Bus.Mac.
<b>Legal address</b>	For Public and Private Law Bodies, it is the address of the entity's Head Office. For Natural Persons it is the Official Address. If your address is specified by an indicator of location other than a street name and number, please insert this instead under the "street name" field and "N/A" under the "number" field.
<b>Non-profit organisation</b>	Non-profit organisation is a legal entity qualified as such when it is recognised by national or, international law.
<b>Public body</b>	Public body means any legal entity established as such by national law
<b>Research organisation</b>	Research organisation means a legal entity established as a non-profit organisation which carries out research or technological development as one of its main objectives.
<b>Higher or secondary education establishment</b>	A secondary and higher education establishment means organisations only or mainly established for higher education/training (e. g. universities, colleges, etc.).
<b>International Organisation</b>	"International Organisation" means an intergovernmental organisation, other than the European Union, which has legal personality under international public law, as well as any specialised agency set up by such an international organisation;
<b>International European Interest Organisation</b>	"International European Interest Organisation" means an international organisation, the majority of whose members are Member States or Associated countries, and whose principal objective is to promote scientific and technological cooperation in Europe;
<b>Joint Research Centre of the European Commission</b>	The European Commission's Joint Research Centre

<b>Entity composed of one or more legal entities</b>	European Economic Interest Groups, Joint Research Units (Unités Mixtes de Recherche), Enterprise Groupings Decision DL/2003/3188 27.11.2003
<b>Commercial Enterprise</b>	Organisations operating on a commercial basis, i.e. companies gaining the majority of their revenue through competitive means with exposure to commercial markets, including incubators, start-ups and spin-offs, venture capital companies, etc.
<b>NACE code</b>	<b>NACE</b> means " <u>N</u> omenclature des <u>A</u> ctivités économiques dans la <u>C</u> ommunauté <u>E</u> uropéenne". Please select <b>one</b> activity from the list that <b>best</b> describes your professional and economic ventures. If you are involved in more than one economic activity, please select the <b>one</b> activity that is <b>most</b> relevant in the context of your contribution to the proposed project. For more information on the methodology, structure and full content of NACE (rev. 1.1) classification please consult EUROSTAT at: <a href="http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_CLS_DLD&amp;StrNom=NACE_1_1&amp;StrLanguageCode=EN&amp;StrLayoutCode=HIERARCHIC">http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_CLS_DLD&amp;StrNom=NACE_1_1&amp;StrLanguageCode=EN&amp;StrLayoutCode=HIERARCHIC</a> .
<b>Small and Medium-Sized Enterprises (SMEs)</b>	SMEs are micro, small and medium-sized enterprises within the meaning of Recommendation 2003/361/EC in the version of 6 May 2003. The full definition and a guidance booklet can be found at <a href="http://ec.europa.eu/enterprise/enterprise_policy/sme_definition/index_en.htm">http://ec.europa.eu/enterprise/enterprise_policy/sme_definition/index_en.htm</a> To find out if your organisation corresponds to the definition of an SME you can use the on-line tool at <a href="http://ec.europa.eu/research/sme-techweb/index_en.cfm">http://ec.europa.eu/research/sme-techweb/index_en.cfm</a>
<b>Contact point</b>	It is the <b>main researcher or team leader in charge</b> of the proposal for the participant. For participant number 1 (the coordinator), this will be the person the REA will contact concerning this proposal (e.g. for additional information, invitation to hearings, sending of evaluation results, convocation to negotiations).
<b>Authorised representative to sign the grant agreement or to commit the organisation for this proposal</b>	Please indicate the contact details of the person in the Host Organisation who would be authorised to sign the <i>grant agreement</i> with the REA in case the proposal is selected for funding.
<b>Title</b>	Please choose one of the following: Prof., Dr., Mr., Mrs., Ms.
<b>Sex</b>	This information is required for statistical and mailing purposes. Indicate Female or Male as appropriate.
<b>Phone and fax numbers</b>	Please insert the full numbers including country and city/area code. Example +32-2-2991111.

<b>Section A3 – Information on the Researcher:</b>	
<b>Location of origin (country)</b>	The country in which the location of origin is situated (see below). Insert the name of the country as commonly used.
<b>Location of origin (town)</b>	The place where the <i>researcher</i> has resided or carried out his/her main activity for the longest period in the three years immediately preceding the at the time of the relevant deadline for proposal submission.
<b>Contact address</b>	Fill in only the fields forming your complete postal address where you will be residing up to the deadline. If your address is specified by an indicator of location other than a street name and number, please insert this instead under the "street name" field and "N/A" under the "number" field. Please make sure that the email address given will still be valid for at least a year after the deadline.
<b>University degree</b>	Date of award of a degree which entitles the holder to embark on doctoral studies in the country in which the degree was obtained or in the host country, without having to acquire any further qualifications. Wrong or missing information may cause your proposal to be ineligible.
<b>Doctorate expected before the deadline</b>	If you do not yet have a doctoral degree and expect to have it before the deadline, please indicate the expected date of award. Researchers must have obtained a doctoral degree at the latest on the date of the relevant deadline for submission of proposals or have at least 4 years of research experience after obtaining the university degree giving access to a doctorate on the date of the relevant deadline for submission of proposals. Wrong or missing information may cause your proposal to be ineligible.
<b>Doctorate</b>	Please specify the date of award of a doctoral degree using the format (DD/MM/YYYY). Wrong or missing information may cause your proposal to be ineligible.
<b>Full-time postgraduate research experience</b>	The information provided in this field should reflect the researcher's full-time post graduate research experience at the time of the relevant deadline for submission of the proposal. Post-graduate refers to a degree which entitles the holder to embark on doctoral studies without having to acquire any further qualifications. Only time spent on post graduate research activities (whether remunerated or not, and including the period of research training e.g. PhD period) should be included. If an applicant has been engaged in other professional activities than research in certain periods since his/her graduation, this time will not count as 'full-time post graduate research experience'. Any periods of part-time activity in research should be translated into full-time experience (e.g. 3 years half time = 1,5 years full-time). Please note that the proposer may be asked to produce evidence of this experience at any stage. Wrong or missing information may cause your proposal to be ineligible.
<b>Place of activity/place of residence (previous 5 years)</b>	Indicate the period(s) and the country/countries in which you have legally resided and/or had your main activity (work, studies....) during the last 5 years up until the deadline for the submission of the proposal. <u>The 5 years prior to the deadline must be covered.</u> Wrong or missing information may cause your proposal to be ineligible. Any additional information you wish to make known to the evaluators should be included in the Part B (proposal description/CV).
<b>Period</b>	Indicate the starting date and the end date of each period using the format: DD/MM/YYYY, starting with the most recent period. The first date must be the call deadline. <u>There must be no gaps between the periods.</u>

<p><b>Have you submitted or are you in the process of submitting another proposal for Marie Curie actions IEF, IOF, or IIF or have you previously benefited from Community funding under Marie Curie actions?</b></p>	<p>Each researcher may only submit one proposal at a time for the following actions:</p> <ul style="list-style-type: none"> <li>• Marie Curie Intra-European Fellowships (IEF),</li> <li>• Marie Curie Outgoing International Fellowships (IOF),</li> <li>• Marie Curie Incoming International Fellowships (IIF),</li> </ul> <p>Having several proposals in the application procedure for one or more actions at the same time may render your proposal ineligible. New or similar proposals are eligible to be submitted only after the evaluation procedure of the relevant round has been terminated.</p> <p>Please note that the Research Executive Agency will not conclude another <i>grant agreement</i> for the same project.</p> <p>If you have previously benefited from Community funding under Marie Curie actions in the same field, you should demonstrate (in part B) the substantial added value of the new project. Indicate here the action name, year and the proposal or contract number.</p>
---	---

<b>Section A4 – Funding Request IOF</b>	
<b>Type B Fixed-amount fellowship (Y/N)</b>	The host organisation can recruit the researcher either under an employment contract/fellowship with full social security coverage (Type A) or on a fixed-amount fellowship with minimum social security (Type B). In most cases Type A is chosen. More information concerning the choice can be found in Annex 3 of the Work Programme. Please indicate here if you choose the Type B Fixed-amount fellowship. Please note that in this case the allowance for the researcher will be lower.
<b>Mobility allowance</b>	Family related mobility allowance refers to a researcher with a spouse and/or children. Please see the definition in Annex 3 of the Work Programme. The reference date for family situation is the relevant deadline for submission of proposals. Please indicate your eligibility status by inserting YES or NO in the boxes.
<b>Post-graduate Research Experience of the applicant</b>	Please choose between the 3 categories to indicate the <b>full-time</b> research experience of the applicant at the deadline of the call: less than 4 years (<4 years), from 4 up to 10 years (4-10 years), or more than 10 years (>10 years).



# Proposal Submission Forms



EUROPEAN COMMISSION

7<sup>th</sup> Framework Programme on Research,  
Technological Development and  
DemonstrationMarie Curie Actions  
**International Outgoing Fellowships  
(IOF)****A1**



<i>Proposal Number</i>	<input type="text"/>	<i>Proposal Acronym</i>	<input type="text"/>
------------------------	----------------------	-------------------------	----------------------

## GENERAL INFORMATION ON THE PROPOSAL

<i>Proposal Title</i>	<input type="text"/>		
<i>Marie Curie action-code</i>	<input type="text"/>	<i>Scientific Panel</i>	<input type="text"/>
<i>Total duration in months</i>	<input type="text"/>	<i>Call identifier</i>	<input type="text"/>
<i>Keywords (up to 200 characters)</i>	<input type="text"/>		
<i>Abstract (up to 2000 characters)</i>			
<input type="text"/>			

<b><i>Has a similar proposal been submitted to a Marie Curie Action under this or previous RTD Framework Programmes?</i></b>		<b>YES/NO</b>	<input type="text"/>
<i>If yes:</i>			
<i>Programme name(s) and year</i>	<i>Proposal number(s)</i>		
<input type="text"/>	<input type="text"/>		
<input type="text"/>	<input type="text"/>		

<b><i>Does this proposal include any of the sensitive ethics issues detailed in the Research Ethics Issues table of Part B?</i></b>		<b>YES/NO</b>	<input type="text"/>
---	--	---------------	----------------------

	<h1>Proposal Submission Forms</h1>	
	Research Executive Agency 7 <sup>th</sup> Framework Programme on Research, Technological and Development	Marie Curie Actions <b>International Outgoing Fellowships (IOF)</b>
		<b>A2</b>

Proposal Nr		Proposal Acronym		Participant Nr	<b>1</b>
-------------	--	------------------	--	----------------	----------

### INFORMATION ON ORGANISATIONS

If your organisation has already registered for FP7, enter your Participant Identity Code	[PIC or 'none']
Organisation legal name	
Organisation short name	

### Administrative data

<b>Legal address</b>			
Street name		Number	
Town			
Postal Code / Cedex			
Country	<b>EU MS/AC</b>		
Internet homepage (optional)			

### Status of your organisation

Certain types of organisations benefit from special conditions under the FP7 participation rules. The Commission also collects data for statistical purposes.



The guidance notes will help you complete this section.

**Please 'tick' the relevant box(es) if your organisation falls into one or more of the following categories:**

- Non-profit organisation** •
- Public body** •
- Research organisation** •
- Higher or secondary education establishment** •
- International organisation •
- International European Interest organisation •
- Joint Research Centre of the European Commission •
- Entities composed of one or more legal entities [European Economic Interest Group/ Joint Research unit (Unité mixte de recherche) / Enterprise groupings] •
- Commercial Enterprise •

#### **Main area of activity (NACE code):**

<b>The following section relating to the status of Small or Medium Sized Enterprises is to be completed only by the participants having chosen NONE of the options in the first section under "Status of your organisation"</b>	
1. Is your number of employees smaller than 250? ( <i>full time equivalent</i> )	[yes/no]
2. Is your annual turnover smaller than €50 million?	[yes/no]
3. Is your annual balance sheet total smaller than €43 million?	[yes/no]
4. Are you an autonomous legal entity?	[yes/no]
You are <b>not an SME</b> if your answer to question 1 is "NO" and/or your answer to both questions 2 and 3 is "NO". In all other cases, you might conform to the Commission's definition of an SME. <b>Please check</b> the additional conditions given in annex X.	
<b>Following this check, do you conform to the Commission's definition of an SME</b>	[yes/no]

		<h1>Proposal Submission Forms</h1>		
		Research Executive Agency 7 <sup>th</sup> Framework Programme on Research, Technological and Development	Marie Curie Actions <b>International Outgoing Fellowships (IOF)</b>	<h1>A2</h1>



### Dependencies with (an)other participant(s)

Are there <b>dependencies</b> between your organisation and (an)other participant(s) in this proposal? ( <b>Yes or No</b> )				
If Yes:				
Participant Number		Organisation Short Name		Character of dependence
Participant Number		Organisation Short Name		Character of dependence
Participant Number		Organisation Short Name		Character of dependence

### Contact points

<b>Person in charge (For the coordinator (participant number 1) this person is the one who the REA will contact in the first instance)</b>				
Family name		First name(s)		
Title		Sex (Female – F / Male – M)		
Position in the organisation				
Department/Faculty/Institute/Laboratory name/ ...				
<b>Is the address different from the legal address? YES/NO</b>				
Street name		Number		
Town				
Postal Code / Cedex				
Country				
Phone 1		Phone 2		
E-mail		Fax		

<b>Authorised representative to sign the grant agreement or to commit the organisation for this proposal</b>				
Family name		First name(s)		
Title		Sex (Female – F / Male – M)		
Position in the organisation				
Department/Faculty/Institute/Laboratory name/ ...				
<b>Is the address different from the legal address? YES/NO</b>				
Street name		Number		
Town				
Postal Code / Cedex				
Country				
Phone 1		Phone 2		
E-mail		Fax		

	<h1>Proposal Submission Forms</h1>	
	Research Executive Agency 7 <sup>th</sup> Framework Programme on Research, Technological and Development	Marie Curie Actions <b>International Outgoing Fellowships (IOF)</b>
		<b>A2</b>

<i>Proposal Nr</i>		<i>Proposal Acronym</i>		<i>Participant Nr</i>	<b>2</b>
--------------------	--	-------------------------	--	-----------------------	----------

### INFORMATION ON ORGANISATIONS

If your organisation has already registered for FP7, enter your Participant Identity Code	<i>[PIC or 'none']</i>
<i>Organisation legal name</i>	
<i>Organisation short name</i>	

### Administrative data

<b>Legal address</b>	
Street name	Number
Town	
Postal Code / Cedex	
Country	<b>Other Third Country</b>
Internet homepage (optional)	

### Status of your organisation



Certain types of organisations benefit from special conditions under the FP7 participation rules. The Commission also collects data for statistical purposes. The guidance notes will help you complete this section.

**Please 'tick' the relevant box(es) if your organisation falls into one or more of the following categories:**

- Non-profit organisation** •
- Public body** •
- Research organisation** •
- Higher or secondary education establishment** •
- International organisation •
- International European Interest organisation •
- Joint Research Centre of the European Commission •
- Entities composed of one or more legal entities [European Economic Interest Group/ Joint Research unit (Unité mixte de recherche) / Enterprise groupings] •
- Commercial Enterprise •

**Main area of activity (NACE code):**

<b>The following section relating to the status of Small or Medium Sized Enterprises is to be completed only by the participants having chosen NONE of the options in the first section under "Status of your organisation"</b>	
1. Is your number of employees smaller than 250? ( <i>full time equivalent</i> )	<b>[yes/no]</b>
2. Is your annual turnover smaller than €50 million?	<b>[yes/no]</b>
3. Is your annual balance sheet total smaller than €43 million?	<b>[yes/no]</b>
4. Are you an autonomous legal entity?	<b>[yes/no]</b>
You are <b>not an SME</b> if your answer to question 1 is "NO" and/or your answer to both questions 2 and 3 is "NO". In all other cases, you might conform to the Commission's definition of an SME. <b>Please check</b> the additional conditions given in annex X.	
<b>Following this check, do you conform to the Commission's definition of an SME</b>	<b>[yes/no]</b>

	<h1>Proposal Submission Forms</h1>	
	Research Executive Agency 7 <sup>th</sup> Framework Programme on Research, Technological and Development	Marie Curie Actions <b>International Outgoing Fellowships (IOF)</b>
		<h2>A2</h2>

### Dependencies with (an)other participant(s)

Are there <b>dependencies</b> between your organisation and (an)other participant(s) in this proposal? ( <b>Yes or No</b> )		
If Yes:		
Participant Number	Organisation Short Name	Character of dependence
Participant Number	Organisation Short Name	Character of dependence
Participant Number	Organisation Short Name	Character of dependence

### Contact points

<b>Person in charge (For the coordinator (participant number 1) this person is the one who the REA will contact in the first instance)</b>			
Family name		First name(s)	
Title		Sex (Female – F / Male – M)	
Position in the organisation			
Department/Faculty/Institute/Laboratory name/ ...			
<b>Is the address different from the legal address? YES/NO</b>			
Street name		Number	
Town			
Postal Code / Cedex			
Country			
Phone 1		Phone 2	
E-mail		Fax	

<b>Authorised representative to sign the grant agreement or to commit the organisation for this proposal</b>			
Family name		First name(s)	
Title		Sex (Female – F / Male – M)	
Position in the organisation			
Department/Faculty/Institute/Laboratory name/ ...			
<b>Is the address different from the legal address? YES/NO</b>			
Street name		Number	
Town			
Postal Code / Cedex			
Country			
Phone 1		Phone 2	
E-mail		Fax	



# Proposal Submission Forms



EUROPEAN COMMISSION



7<sup>th</sup> Framework Programme on  
Research, Technological  
Development and Demonstration

Marie Curie Actions  
**International Outgoing Fellowships  
(IOF)**

# A3

Proposal Number		Proposal Acronym	
<b>INFORMATION ON THE RESEARCHER</b>			
Family Name		Birth Family Name	
First Name(s)			
Title	Sex: Female(F)/Male(M)		
1 <sup>st</sup> nationality		2 <sup>nd</sup> nationality	
Location of origin (country)		Date of birth	
Location of origin (town)			
<b>Contact address</b>			
Street name		Number	
Town			
Postal Code / Cedex			
Country			
Phone 1		Phone 2	
E-mail		Fax	

<b>Qualifications</b>			
University degree		Date of award (DD/MM/YYYY)	
Doctorate expected before the deadline		Expected date of award (DD/MM/YYYY)	
Doctorate		Date of award (DD/MM/YYYY)	
Full-time postgraduate research experience		Number of months	
Other academic qualifications		Date of award (DD/MM/YYYY)	
<b>Place of activity/place of residence (previous 5 years)</b>			
Period: From DD/MM/YYYY	To DD/MM/YYYY	Country	
<b>INVOLVEMENT OF THE RESEARCHER IN OTHER MARIE CURIE PROPOSALS</b>			
Are you applying for this grant in order to resume a career after a break ?		YES/NO	
If so, for how long have you been inactive in research ? (number of months)			
Have you submitted or are you in the process of submitting another proposal for the Marie Curie Actions: IEF, IOF, IIF or CIG, or have you previously benefited of Community funding under Marie Curie actions ?		YES/NO	
If yes:			
Action name(s) and year	Proposal or contract number(s)		

	<b>Proposal Submission Forms</b>		
	Research Executive Agency 7 <sup>th</sup> Framework Programme on Research, Technological and Development	Marie Curie Actions <b>International Outgoing Fellowships (IOF)</b>	<b>A4</b>

Proposal Number		Proposal Acronym	
-----------------	--	------------------	--

FUNDING REQUEST				
Year Number	Main Phase		Return Phase (IIF and IOF only)	
	Full-time person-months	Type B Fixed-amount Fellowship (Y/N)	Full-time person-months	Type B Fixed-amount Fellowship (Y/N)
Year 1				
Year 2 <sup>5</sup>				
Year 3				
Total				

<b>Mobility allowance</b>	
Are you eligible for the family-related mobility allowance? <b>YES/NO</b>	

Post-graduate Research Experience of the applicant at the deadline of the call (<4 years; 4-10 years; >10 years)	
--	--

<sup>5</sup> If the incoming phase lasts 12 months then fill the return phase section only

## Annex 4 - Instructions for drafting "Part B" of the proposal

A description of this action is given in section 2 of this Guide for Applicants. Please examine this carefully before preparing your proposal.

This annex provides a template to help you structure your proposal. It will help you present important aspects of your planned work in a way that will enable the experts to make an effective assessment against the evaluation criteria (see Annex 2).

The **maximum length** of part B is **27 pages** (excluding table of contents; the ethics issues section as well as start and end pages). In addition there are limits applied separately to most sections, see below. The experts will be instructed to disregard any pages exceeding these limits. Annexes are not allowed.

The minimum font size allowed is 11pt with single line spacing. The page size is A4, and all margins should be at least 15mm (not including any headers or footers).

Please make sure that:

- You use the correct template to prepare your proposal
- You respect the maximum number of pages. The REA reserves the right to disregard parts of a proposal that exceed the maximum lengths specified along with any attachments/additional information provided to the proposal
- Part B of your proposal carries the proposal acronym as a header to each page and that all pages are numbered in a single series on the footer of the page to prevent errors during handling. It is recommended that the numbering format "Part B - Page X of Y" is used
- Your proposal is complete. Incomplete proposals are not eligible and will not be evaluated.

# **STARTPAGE**

## **PEOPLE MARIE CURIE ACTIONS**

### **International Outgoing Fellowships (IOF) Call: FP7-PEOPLE-2011-IOF**

#### **PART B**

#### **“PROPOSAL ACRONYM”**

## Part B -Table of Contents of Proposals

To draft PART B of proposals applicants should take into account the following structure and subheadings.

If required for an adequate description of their project, applicants may wish to add further headings.

### **B1 RESEARCH AND TECHNOLOGICAL QUALITY (MAXIMUM 8 PAGES)**

- Research and technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal
- Appropriateness of research methodology and approach
- Originality and Innovative nature of the project, and relationship to the 'state .of the art' of research in the field
- Timeliness and relevance of the project
- Host research expertise in the field (outgoing and return host)
- Quality of the group/supervisors (outgoing and return host)

### **B2 TRAINING (MAXIMUM 2 PAGES)**

- Clarity and quality of the research training objectives for the researcher
- Relevance and quality of additional research training as well as of transferable skills offered
- Host expertise in training *experienced researchers* in the field and capacity to provide mentoring/tutoring (outgoing and return host)

### **B3 RESEARCHER (MAXIMUM 7 PAGES WHICH INCLUDES A CV AND A LIST OF MAIN ACHIEVEMENTS)**

- Research experience
- Research results including patents, publications, teaching etc., taking into account the level of experience
- Independent thinking and leadership qualities
- Match between the fellow's profile and project
- Potential for reaching a position of professional maturity
- Potential to acquire new knowledge

### **B4 IMPLEMENTATION (MAXIMUM 6 PAGES)**

- Quality of infrastructure / facilities and international collaboration of host (outgoing and return host)
- Practical arrangements for the implementation and management of the research project (outgoing and return host)
- Feasibility and credibility of the project, including work plan
- Practical and administrative arrangements and support for the hosting of the fellow (outgoing and return host)

### **B5 IMPACT (MAXIMUM 4 PAGES)**

- Potential for 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 transferable skills training
- Contribution to career development or re-establishment, where relevant
- Potential for creating long term collaborations and mutually beneficial cooperation between Europe and the Other Third Country.
- Contribution to European excellence and European competitiveness
- Benefit of the mobility to the European Research Area
- Impact of the proposed outreach activities

### **B6 ETHICS ISSUES (NO PAGE LIMIT)**

## **B1 RESEARCH AND TECHNOLOGICAL QUALITY (maximum 8 pages)**

### **Research and technological Quality, including any interdisciplinary and multidisciplinary aspects of the proposal**

Give a clear description of the state-of-the-art of the research topic. Provide a clear and specific description of the research objectives against the background of the state of the art, and the results hoped for. The most relevant bibliographical references should be provided, and must be included in the overall page count. If relevant, provide information on interdisciplinary/multidisciplinary and/or inter-sectoral aspects of the proposal.

### **Appropriateness of research methodology and approach**

For each objective explain the methodological approach that will be employed in the project and justify it in relation to the overall project objectives. Describe any relevant techniques, methods or analyses that will be applied.

### **Originality and innovative nature of the project, and relationship to the 'state of the art' of research in the field**

Explain the contribution that the project is expected to make to advance the state-of-the-art within the project field. Describe any novel concepts, approaches or methods that will be employed.

### **Timeliness and relevance of the project**

Describe the appropriateness of the research proposed against the state of the art and why it is timely. Outline the benefit that will be gained from undertaking the project at European Research Area (ERA) level and how the fellowship will contribute to enhance ERA research excellence and reintegrate the researcher. Describe the scientific, technological, socio-economic or other reasons for carrying out further research in the field covered by the project

### **Host research expertise in the field**

The host institution must explain its level of experience on the research topic proposed and document its track record of work, including the main international collaborations. Information provided should include participation in projects, publications, patents and any other relevant results.

### **Quality of the group/supervisors**

Similar information as above should be provided for the *scientist in charge* of the supervision of the project. Where relevant, show that any gender issues associated to the proposal have been adequately taken into account. The host institution must demonstrate its track record of previous training achievements especially at an advanced level within the field of research.

## **B2 TRAINING (maximum 2 pages)**

### **Clarity and quality of the research training objectives for the researcher**

State the training objectives and explain in detail how these can be beneficial for the (further) development of an independent research career

**Relevance and quality of additional research training as well as of transferable skills offered with special attention to exposure to the industry sector, where appropriate**

Explain how the training provided will contribute to diversifying/broadening the competencies of the *researcher*, and how this will influence the *researcher's* career development. Outline complementary training and skills expected during the execution of the project (such as research management, presentation skills, ethics, etc.).

**Host expertise in training *experienced researchers* in the field and capacity to provide mentoring/tutoring**

Give a short outline of the host's (outgoing and return phase) expertise in mentoring/tutoring researchers

**B3 RESEARCHER (maximum 7 pages which includes a CV and a list of main achievements)**

**Research experience**

The applicant must present a comprehensive description of his/her research experience. A scientific/professional CV must be provided and should mention explicitly:

- academic achievements
- list of other professional activities
- any other relevant information.

**Research results**

Outline the major achievements of the researcher. These may also include results in the form of funded projects, publications, patents, reports, invited participation in conferences etc., taking into account the level of experience. To help the expert evaluators better understand the level of skills and experience it is advisable to write a short description (around 250 words) of the major accomplishments mentioning the purpose, results, skills acquired, derived applications etc.

**Independent thinking and leadership qualities**

Describe the activities that reflect initiative, independent thinking, project management skills and leadership. Describe the potential that the researcher has for increasing and reinforcing these qualities.

**Match between the fellow's profile and project**

Show that the applicant's skills and experience are suitable for the project proposed.

**Potential for reaching a position of professional maturity**

Describe the potential of the researcher to reach professional maturity.

**Potential to acquire new knowledge**

Describe the researcher's ability to acquire new knowledge and skills.

## **B4 IMPLEMENTATION (maximum 6 pages)**

### **Quality of infrastructure / facilities and international collaboration of host (outgoing and return host)**

The proposal must explain the level of experience of the outgoing host institution on the research topic proposed, including all international collaborations (outgoing and return host). Information provided should include participation in projects, publications, patents and any other relevant results. The facilities available in both the outgoing and returning host and their adequacy to the research project should be mentioned.

Information on the capacity to provide training in complementary skills that can further aid the *fellow* in the reintegration period should be included. The host needs to specify what are the infrastructures available and whether these can respond to the needs set by the execution of the project.

The European return host's qualities and capabilities to absorb and make use of the experience gained by the returning *fellow* should be described.

### **Practical arrangements for the implementation and management of the project (outgoing and return host)**

The applicant and the host institutions for both phases (outgoing and return) must be able to provide information on how the implementation and management of the fellowship will be achieved. The expert evaluators will be examine the practical arrangements that can have an impact on the feasibility and credibility of the project.

### **Feasibility and credibility of the project, including work plan**

Provide a work plan that includes the goals that can help assess the progress of the project. Mention the arrangements made in terms of supporting the reintegration phase of the *fellow* providing a career development plan where applicable. Where appropriate, describe the approach to be taken regarding the intellectual property that may arise from the research project.

### **Practical and administrative arrangements and support for the hosting of the *fellow* (outgoing and return host)**

The host of the outgoing phase should describe what practical arrangements are in place to host a researcher coming from another country. What support will be given to him/her to settle into their new host country (in terms of language teaching, help with local administration, obtaining of permits, accommodation, schools, childcare etc.) The host of the return phase should explain which measures are planned for the successful re-integration of the researcher.

## **B5 IMPACT (maximum 4 pages)**

### **Potential for acquiring competencies**

Describe the *fellow's* potential for acquiring (complementary) competencies and skills during the fellowship and what impact this will have on the prospects of reaching and/or reinforcing a position of professional maturity and/or research independence. Explain how the newly acquired skills and knowledge will be transferred from the *Other Third Country* to the return host

### **Contribution to career development or re-establishment where relevant**

How will the fellowship contribute in the medium- and long-term to the development of the *fellow's* career? In the case of a *fellow* returning to research, how will his/her re-establishment be helped by the fellowship?

**Potential for creating long term collaborations and mutually beneficial co-operation between Europe and the *Other Third Country***

What is the likelihood of continuing the collaboration between the two hosts after the end of the fellowship?

**Contribution to European excellence and European competitiveness**

Describe the extent to which the project will increase the attractiveness of the European Research Area for researchers, increase ERA competitiveness and produce long-term synergies and/or structuring effects

**Benefit of the mobility to the European Research Area**

Describe how the proposed mobility is genuine and therefore beneficial to the European Research Area. Genuine mobility is considered to allow the researcher to work in a significantly different geographical and working environment, different from the one in which he has already worked before.

**Impact of the proposed outreach activities**

Describe the outreach activities of the proposal to be implemented by the researcher during the project duration (for examples, see box on Outreach Activities below).

### Outreach Activities within Marie Curie Projects

Outreach Activities are dissemination initiatives directed at the general public. The primary goal is to create awareness of the importance of research to society and to raise awareness of Marie Curie Actions. Each applicant is invited to submit an Outreach Activities Plan as part of his/her proposal. The type of outreach activities is freely chosen by the applicant and could range from press articles to exposing students from primary and secondary schools or universities to science, research and innovation in order to develop their motivation to embrace research careers.

Outreach activities and their impact are taken into account during the evaluation of proposals in the light of the principles of the 'European Charter for Researchers' and 'Code of Conduct for the Recruitment of Researchers'. The relevant principle in the Charter is: "**Public engagement** - Researchers should ensure that their research activities are made known to society at large in such a way that they can be understood by non-specialists, thereby improving the public's understanding of science. Direct engagement with the public will help researchers to better understand public interest in priorities for science and technology and also the public's concerns."

#### **Possible outreach activities:**

- **Marie Curie Ambassador:** Marie Curie fellows visit schools, universities, community organisations, etc. and promote their research field; Marie Curie fellows - "Ambassadors" - assist teachers in preparing and delivering teaching materials.
- **Workshop Day:** A Marie Curie project runs a workshop/activity day in areas related to the raising of scientific awareness, for school/university students.
- **Summer-School Week:** Students spend one week in a summer school where they receive a first hand experience from the Marie Curie fellows about their current research activities or wider scientific issues; the Marie Curie fellows prepare specific activities, lectures and experiments.
- **Marie Curie Project Open Day:** Students and the general public visit the research institutions or labs and receive a first hand experience or lectures.
- **Public talks, TV-Talks, podcasts and articles in Newspapers:** Marie Curie fellows give a public talk/TV interview or write an article in the local newspaper about the results of the project and how these results could be relevant to the general public.
- **e-Newsletters:** Marie Curie fellows develop a web-based document to be released on the internet for the attention of the public at large (e.g. Wikipedia).
- **Multimedia releases:** Marie Curie fellows make video-clips to be released on the internet, in spaces open to the public at large.

### **B6 ETHICS ISSUES (No page limit)**

Describe any ethics issues that may arise in the proposal. In particular, you should explain the benefit and burden of the experiments and the effects these may have on the research subject. This should be done in conjunction with the information provided in Guide for Applicants, Marie Curie Actions (Ethics) and for **all** proposals the following table must be completed.

**ETHICS ISSUES TABLE**

(Note: Research involving activities marked with an asterisk \* in the left column in the table below will be referred automatically to Ethics Review)

	<b>Research on Human Embryo/ Foetus</b>	<b>YES</b>	<b>Page</b>
*	Does the proposed research involve human Embryos?		
*	Does the proposed research involve human Foetal Tissues/ Cells?		
*	Does the proposed research involve human Embryonic Stem Cells (hESCs)?		
*	Does the proposed research on human Embryonic Stem Cells involve cells in culture?		
*	Does the proposed research on Human Embryonic Stem Cells involve the derivation of cells from Embryos?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

	<b>Research on Humans</b>	<b>YES</b>	<b>Page</b>
*	Does the proposed research involve children?		
*	Does the proposed research involve patients?		
*	Does the proposed research involve people not able to give consent?		
*	Does the proposed research involve adult healthy volunteers?		
	Does the proposed research involve Human genetic material?		
	Does the proposed research involve Human biological samples?		
	Does the proposed research involve Human data collection?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

	<b>Privacy</b>	<b>YES</b>	<b>Page</b>
	Does the proposed research involve processing of genetic information or personal data (e.g. health, sexual lifestyle, ethnicity, political opinion, religious or philosophical conviction)?		
	Does the proposed research involve tracking the location or observation of people?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

	<b>Research on Animals</b>	<b>YES</b>	<b>Page</b>
	Does the proposed research involve research on animals?		
	Are those animals transgenic small laboratory animals?		
	Are those animals transgenic farm animals?		
*	Are those animals non-human primates?		
	Are those animals cloned farm animals?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

	<b>Research Involving Developing Countries</b>	<b>YES</b>	<b>Page</b>
	Does the proposed research involve the use of local resources (genetic, animal, plant, etc)?		
	Is the proposed research of benefit to local communities (e.g. capacity building, access to healthcare, education, etc)?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

	<b>Dual Use</b>	<b>YES</b>	<b>Page</b>
	Research having direct military use		
	Research having the potential for terrorist abuse		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

# **ENDPAGE**

## **PEOPLE MARIE CURIE ACTIONS**

### **Marie Curie International Outgoing Fellowships (IOF) Call: FP7-PEOPLE-2011-IOF**

#### **PART B**

#### **“PROPOSAL ACRONYM”**