

WORK PROGRAMME 2008

PEOPLE

(European Commission C(2008)4483 of 22 August 2008)

How to use the Work Programme (WP)

The WP is to be read in association with the Framework Programme and People Specific Programme decisions, and with the relevant Guides for Applicants. The most current Guides and other documents are available on CORDIS under www.cordis.europa.eu/fp7/PEOPLE.

***Part I** describes the background to the WP and the broad policy objectives. **Part II** gives details of the 2008 Actions, while **Part III** gives the corresponding information, in overview form, of the relevant calls. The Annexes contain reference material.*

Changes to the 2008 'People' Work Programme

This Work Programme has been updated with respect to the version adopted on 28 November 2007. The modifications are as follows:

2009 Budget:

◆The figures of the 2009 budget related to calls published in 2008 (Initial Training Network and Co-funding) have been introduced.

Specific actions not implemented through calls for proposals:

◆Introduction of new awareness and visibility raising activity linked to the re-branding into "EURAXESS –Researchers in motion" of several ongoing actions related to ERA-MORE, European Mobility Portal and Charter and Code

◆Introduction of a pilot project for policy monitoring action related to the proposed renewed partnership on researchers' mobility and career development in the frame of the follow-up of the ERA-Green Paper; also in that frame the introduction of a feasibility study for the technical centralisation of national researchers' mobility portals.

◆Adaptation of the budgets for several activities, related to a re-estimate of the requirements for their implementation.

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I CONTEXT

1. Introduction

This is the 2008 Work Programme implementing the 'People'¹ Specific Programme of the 7th Framework Programme (2007 to 2013). It translates in specific actions the objectives and priorities in the Specific Programme, the associated funding, and the timetable for implementation for the year 2008.

To support the further development and consolidation of the European Research Area, the People Specific Programme's overall strategic objective is to make Europe more attractive for the best researchers. Dedicated entirely to human resources in research, this Specific Programme has a significant overall budget of over EUR 4.7 billion over the seven years of FP7. It will be implemented through "Marie Curie" actions under five headings, with the following budget breakdown:

Actions	Indicative budget share 2007-2013	Budget 2008 (EUR million)
1. Initial training of researchers	around 40 %	185
2. Life-long training and career development (including Co-funding)	between 25% and 30%	147
3. Industry-academia pathways and partnerships	5 to 10%	45
4. International dimension	25 to 30%	93.25
5. Specific Policy actions	around 1%	6.89

This Work Programme contains the funding schemes to be used, the eligibility criteria and the criteria for proposal evaluation and project selection, including award criteria. It also identifies organisations which will receive support actions for specific legal entities.

In preparing this Work Programme, the Commission has taken into account advice from the 'People'² Advisory Group.

2. Implementation principles and overall objectives

The actions under the 'People' Specific Programme address researchers at all stages of their careers, in both public and private sectors. Researchers are of at least postgraduate or equivalent level and are classified on the basis of professional experience (see definitions below).

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

² Information on the list of members of the advisory groups is available on http://ec.europa.eu/research/fp7/advisory_en.html.

Definitions used throughout this Work Programme (Italics in the text imply this definition)

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

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

Returning Researchers are researchers from Member States or Associated countries who can provide evidence that they have legally resided and have had their principal activity (work, studies, etc) in a Third Country for at least three out of the last four years immediately prior to the relevant deadline for submission or selection by the host institution, depending on the action.

Assimilated Nationals are nationals of Third Countries having legally resided, and having had their main activity (work, studies, etc.), in Member States/Associated Countries for at least three out of the last four years, measured at the relevant deadline for submission, or at the time of selection by the host organisation, depending on the action. For the purposes of the Marie Curie Actions, these researchers assume the nationality of the country in which they have resided the longest during the past four years.

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

The 'Marie Curie Actions' are open to all domains of research and technological development addressed under the EC Treaty. Research fields are chosen freely by the applicants in a 'bottom-up' manner.

All research carried out under this work programme must respect fundamental ethical principles, and the requirements set out in the text of the 'People' Specific Programme. The Commission is fully committed to the principles set out in the declaration on the use of human embryonic stem cells³ More information on the procedures for the peer review of submitted proposals is given in the 'Rules for submission of proposals, and the related evaluation, selection and award procedures'.

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

Trans-national and intersectoral mobility is a key feature and a strong participation by enterprises, in particular SMEs, is considered an important added value. The enhancement of industry-academia cooperation in terms of research training, career development and knowledge-sharing is encouraged. The definition of "industry" goes beyond the traditional manufacturing and/or production industries and comprises enterprises in the general sense of commercial economic actors.

The international dimension is addressed by actions aiming to strengthen and enrich international cooperation through researchers and to attract research talent to Europe. As

³ Commission Communication COM(2006) 548 of 26 September 2006, states that the Commission will maintain the practice of the 6th Framework Programme. Accordingly, the Commission will not fund projects which include research activities which destroy human embryos, including for the procurement of stem cells. The exclusion of funding of this step of research will not prevent Community funding of subsequent steps involving human embryonic stem cells.

in the past this includes actions for individual researchers, namely International Outgoing Fellowships for Career Development (IOF), International Incoming Fellowships (IIF) and International Reintegration Grants (IRG). A new instrument for international collaboration is introduced: the International Research Staff Exchange Scheme (IRSES). This encourages partnerships based on staff exchange between several European research organisations and organisations from certain *third countries*.

The following 'Marie Curie Actions': Initial Training Networks, Co-funding of Regional, National and International Programmes, Industry-Academia Pathways and Partnerships, Marie Curie International Incoming Fellowships and the International Research Staff Exchange Scheme are also open to *third country* researchers. Additionally, depending on the scheme, the participation of legal entities from *third countries* and of international organisations is foreseen under the conditions provided by the Rules for Participation⁴ (for details see each detailed Action in part II).

The programme aims to ensure gender mainstreaming by encouraging equal opportunities in all 'Marie Curie Actions' and by benchmarking gender participation, with a view of achieving a broad balance over the period of the Framework Programme. A target of at least 40% participation by women is therefore set for 2008. The actions will be designed to ensure that researchers can achieve an appropriate work/life balance and will contribute to facilitate resuming a research career after a break. Although as a general rule fellowships are expected to be fulltime, flexibility is foreseen for instance in terms of splitting a fellowship in more than one stay, or through part-time working, if justified and appropriate in the frame of the project implementation.

In the implementation of the Marie Curie Actions, attention is also paid to the working conditions, transparency of recruitment processes, and career development as regards the researchers recruited on projects and programmes funded. For this the Commission Recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers⁵ offers a reference framework, while respecting its voluntary nature.

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

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

⁴ Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, page 1].

⁵ Commission recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers, C(2005) 576 of 11.3.2005.

In case of submission of a proposal concerning a project in the same field for which the applicant-participant has already previously received Community financing under the 'Marie Curie Actions' under the 7th Framework programme or under similar actions under previous Framework Programmes, the applicant has to demonstrate clearly the substantial added value of the new project in relation to the project previously financed.

3. Repartition of the indicative budget

For all the Marie Curie actions, except, International Reintegration Grants (IRG), European Reintegration Grants (ERG), Co-funding of Regional, National and International Programmes (COFUND) and International Research Staff Exchange Scheme (IRSES), the distribution of the indicative budget of the calls over the scientific disciplines will be based on the number of eligible proposals received, which are allocated to one of 8 scientific panels⁶. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated⁷ in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.

For IRG, ERG, IRSES and Night there will be a single ranked list.

For COFUND the distribution of the indicative budget of the call between panel (A) "Existing trans-national fellowship programmes" and panel (B) "New fellowship programmes with transnational mobility" will be based on the requested Community contribution of the proposals positively evaluated. If the budget allocated to one of the panels exceeds the requirements of all proposals positively evaluated⁷ in that panel, the excess budget will be transferred to the other panel. Equally, if the allocated funding to one panel is insufficient to fund the highest ranked proposal in that panel, necessary budget will be transferred from the other panel in order to ensure that the highest ranked proposal can be funded.

II 2008 IMPLEMENTATION

In general, the 'People' Specific Programme is implemented through calls for proposals⁸. This work programme contains the calls for proposals published in 2007 and implemented in 2008, and those which will be published in 2008 and implemented in 2008 or 2009, subject to budgetary approval. Where activities are implemented through other mechanisms than calls for proposals this is clearly stated in the relevant texts.

Some actions may involve budgetary credits from a future year, subject to availability. In these cases the WP will be duly amended.

Activity 1: Initial Training of Researchers

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

Call Reference FP7-PEOPLE-ITN-2008

⁶ The Marie Curie panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information science and Engineering **ENG**, Environment and geosciences **ENV**, Life sciences **LIF**, Mathematics **MAT**, Physics **PHY**

⁷ Measured as proposals having passed all relevant evaluation thresholds

⁸ Proposals for actions, which do not fall within the scope of a call for proposals, may be submitted to the Commission only when it is provided for in this Work Programme.

1.1. Introduction and objective of the action

The action aims to improve career perspectives of *early-stage researchers* in both public and private sectors, thereby making research careers more attractive to young people. This will be achieved through a trans-national networking mechanism, aimed at structuring the existing high-quality initial research training capacity throughout Member States and Associated countries in both public and private sectors.

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

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

1.2. Technical content/scope

Participants: A participant in this action is an organisation that is a member of a network selected by the Commission which contributes directly to the implementation of the joint training programme of the network, by recruiting and employing and/or hosting eligible researchers, by providing specialised training modules or by participating in other dedicated network actions.

Normally, a network in this action shall be composed of at least three participants (e.g. universities, research centres, companies, SMEs) established in at least three different Member States or Associated countries. Above this minimum, the participation of *third countries* and of international organisations is foreseen under the conditions provided by the Rules for Participation⁴. Single research organisations in a Member State or Associated country or twinning of research institutions between different Member States or Associated countries can also be considered under this action. In cases of twinning or single organisations, the participants need to demonstrate clearly that the necessary elements of the research training programme that they wish to implement (including the issue of mutual recognition of the training quality by all collaborating organisations) are effectively addressed through well-established, trans-national collaborations with other partner research institutions, without the latter formally being part of the network. The contractual participants would take full responsibility for executing the proposed training programme. The trainees are expected to benefit from these informal networks, including through active mobility between the partner organisations during the training period.

Direct or indirect involvement of organisations from different sectors is considered highly desirable in this action, as appropriate to the research discipline. Industry participation will be foreseen at three levels (in decreasing order of involvement):

- Full network partner: if appropriate to the network and taking into consideration the research discipline;
- Provider of research training and complementary training including secondment opportunities;

⁴ Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, page 1].

- Members of the supervisory board of the network, which would be expected to define the skills requirements for the *early-stage researchers*.

In all cases, the involvement of industry should be at the highest possible level, in function of the nature of the joint training programme and the research field.

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

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

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

Each network will have a clearly identified supervisory board co-ordinating network-wide training. The board will ensure that scientific and technological training through personalised research projects is balanced with complementary skills training, appropriate to the needs of each recruited researcher. It will also establish active and continuous communication and exchange of best practice among the network participants to maximise the benefits of the partnership.

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

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

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

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

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

In this case support, based on the definition of *experienced researchers*, will be limited to 24 months maximum. In all cases eligibility will be determined at the time of recruitment.

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

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

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

Rules of mobility and conditions of nationality applicable to eligible researchers:

Researchers must be nationals of a Member State, Associated country or *third country*. They must be nationals of a country other than that of the premises of the host organisation where they will carry out their project. 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 date of selection by the host institution (short stays such as holidays are not taken into account). This rule does not apply in cases where a researcher is subsequently appointed in another node of the same network within the same country.

As far as international European interest organisations or international organisations located in any of the Member States, Associated countries or *Third Countries* are concerned, this mobility 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 date of selection in the same appointing international organisation.

A researcher holding more than one nationality will be able to carry out a period of mobility in the country of his/her nationality in which he/she has not resided during the previous 5 years. Short stays such as for holidays are not taken into account. *Returning researchers* will be (for this eligibility criterion) considered as eligible to benefit from support under this action in any Member State or Associated country, including in their country of origin.

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

- the recruitment of researchers to be trained;
- the recruitment of the senior “visiting researchers”;
- Networking costs and the organisation of short training events (workshops, seminars, summer schools and conferences). Where these events are open to researchers from outside the network, additional reimbursements are foreseen.

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

1.3. Expected impact of the action

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

Activity 2: “Life-long Training and Career Development”

2.1 MARIE CURIE ACTION: “INTRA-EUROPEAN FELLOWSHIPS FOR CAREER DEVELOPMENT” (IEF)

Call Reference FP7-PEOPLE -IEF-2008

2.1.1. Introduction and objective of the action

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

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

2.1.2. Technical content/scope

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

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

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

Eligible researchers: The action is directed at life-long training and career development and, although not excluding first post-docs, addresses researchers with a more senior profile in terms of experience. On the date of the relevant deadline for submission of

proposals, researchers addressed under this action are those based on the definition of *experienced researchers*.

Rules of mobility and conditions of nationality applicable to eligible researchers:

Researchers must be nationals, or assimilated nationals, of a Member State or Associated country. They must be nationals of a country other than that of the premises of the host organisation where they will carry out their project. At the 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 deadline for submission. Short stays, such as for holidays, are not taken into account.

As far as international European interest organisations or international organisations located in any of the Member States or Associated countries are concerned, this mobility 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 in the same appointing international organisation.

A researcher holding more than one nationality will be able to carry out a period of mobility in a country of his/her nationality in which he/she has not resided during the previous 5 years. Short stays, such as for holidays, are not taken into account.

Returning researchers will be (for this eligibility criterion) considered as eligible to benefit from support under this action in any Member State or Associated country, including in their country of origin.

Community Contribution, Rates and Evaluation Criteria: The Community contribution and rates under this action are based on the Funding Scheme “Support for training and career development of researchers”, set out in Annex 3 of this Work Programme. The evaluation, selection and award criteria are set out in Annex 2.

2.1.3. Expected impact of the action

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

2.2 MARIE CURIE ACTION: “EUROPEAN REINTEGRATION GRANTS” (ERG)

Call References FP7-PEOPLE- ERG-2008-2-2- (FP7-PEOPLE-ERG-2008)

2.2.1. Introduction and objective of the action

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

2.2.2. Technical content/scope

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

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

The proposal, consisting of a research project to be executed at the proposed (re)integration host institute, will have to be submitted by the researcher in conjunction with the proposed host, at the earliest one year before the end of the initial *Marie Curie* fellowship and not later than six months following its end. The execution of the project must start at the latest 12 months after the end of the initial fellowship.

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

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

Eligible Researchers: On the relevant cut-off date, researchers addressed under this action are those based on the definition of *experienced researchers*.

Researchers must be nationals, or *assimilated nationals*, of a Member State or Associated country, benefiting at the time of application or having previously benefited from a training and mobility action under the 7th or one of the previous Framework Programmes⁹ of at least 18 months full time equivalent.

Community Contribution, Rates and Evaluation Criteria: The grant which can cover a period of two up to three years is a flat-rate contribution to the salary costs of the researcher, and/or to the research costs relating to the researcher's project at the reintegration host, such as salary costs of other staff (e.g. assistants, technicians), travel costs, consumables, patent costs and publication costs. The Community rates for this action are based on the Funding Scheme "Support for training and career development of researchers", and are set out in Annex 3 of this Work Programme. The evaluation, selection and award criteria are set out in Annex 2.

2.2.3. Expected impact of the action

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

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

⁹ FP 6 *Marie Curie* Actions eligible in this context are: *Marie Curie* Research Training Networks; *Marie Curie* Host Fellowships for Early Stage Research Training (EST); *Marie Curie* Host Fellowships for the Transfer of Knowledge (ToK); *Marie Curie* Intra-European Fellowships. FP7 *Marie Curie* Actions eligible in this context are: *Initial Training Networks* (ITN); *Intra-European Fellowships for Career Development* (IEF); *Industry-Academia Partnerships and Pathways* (IAPP).

Call Reference FP7-PEOPLE-COFUND-2008

2.3.1. Introduction and objective of the action

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

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

The co-funding action targets a competitive selection of existing or new regional, national and international funding programmes that focus on the objectives set for this action, based on individual-driven mobility. These programmes must run an open, merit-based competition for the applying researchers, and be founded on international peer-review. While avoiding limitations regarding the researchers' origin and destination, they should also offer adequate working conditions for the final beneficiaries. These requirements should be in line with the principles set out in the European Charter for researchers and Code of conduct for the recruitment of researchers¹⁰.

2.3.2. Technical content/scope

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

- Public bodies, as defined in Article 2.13 of the Rules for Participation⁴, responsible for funding and managing fellowship programmes, e.g. ministries, state committees for research, research academies, councils or agencies;
- Other bodies, including research organisations, as defined in Article 2.7 of the Rules for Participation⁴, that finance and manage fellowship programmes either with an official mandate or recognised by public authorities, such as agencies established by governments under private law with a public service mission, charities, etc.;

¹⁰ Commission recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers, C(2005) 576 of 11.3.2005.

⁴ Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, page 1].

⁴ Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, page 1].

- International organisations as defined in Article 2.10 and 11 of Rules for Participation⁴ that run comparable schemes at European level as part of their mission.

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

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

The proposal should demonstrate that the programme or programmes (to be) managed by the participant fund(s) individual research training/career development fellowships for the target group of *experienced researchers* addressed under the activity heading “Life-long training and career development”. The programmes supported should have regular selection rounds for these category of researchers based on open, widely advertised competition, with transparent international peer review and selection of candidates on merits. With regard to working conditions, eligible researchers should be recruited under a regular employment contract where possible, or alternatively under a fixed-amount fellowship with minimum social security, depending on the legal and/or administrative situation of the co-funded programme, the host organisation and/or the researcher.

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

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

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

The reference for the methods of selection of the final beneficiaries and their working conditions provided for under the programme are those laid down in the Commission Recommendation on the European Charter for Researchers and a Code of Conduct for their Recruitment¹¹.

Selected programmes under the co-funding actions are required to brand the eligible fellowships awarded “Co-funded by Marie Curie Actions”.

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

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

Community Contribution, Rates and Evaluation Criteria:

The Community contribution is fixed at 40% of the fellowship costs for eligible researchers, with a maximum overall of EUR 5 million to a single applicant entity¹² for one call.

This contribution will take the form of reimbursement of scale of unit costs. The scale of unit contribution consists of a fixed amount per fellow-year, determined for each type of mobility (incoming, outgoing, re-integration) at the negotiation stage, based on evidence of the expected average costs, which will be confirmed by a separate Commission Decision. The requested Community contribution will be the fixed-amount contribution multiplied by the number of fellowship-years.

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

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

2.3.3. Expected impact of the action

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

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

¹² However, in accordance with the Decisions concerning the Seventh Framework Programme (OJ L 412, 30.12.2006, p. 1 Decision No 1982/2006/EC of the European Parliament and of the Council of 18 December 2006) and the 'People' Specific Programme (OJ L 54, 22.02.2007), the provisions of Article 120 (2) of the Council Regulation on the Financial Regulation applicable to the general budget of the European Communities (OJ L 248, 16.09.2002, p.1; Regulation as amended by Regulation (EC, Euratom) No 1995/2006 (OJ L 390, 30.12.2006, p.1)) and Article 184a of the Commission Regulation laying down detailed rules for the implementation of Council Regulation on the Financial Regulation applicable to the general budget of the European Communities (OJ L 357, 31.12.2002, p.1; Regulation as last amended by Regulation (EC, Euratom) No 478/2007 (OJ L 111/13)), shall not be applicable with regard to the financial support provided by the participants in the Co-funding action to third parties participating in fellowships selected following calls for proposals launched under this action.

- (3) **Combating fragmentation** in terms of objectives, evaluation methods and working conditions of regional, national or international offers in this area

Activity 3: “Industry-Academia Partnerships and Pathways”

3.1 MARIE CURIE ACTION: “INDUSTRY-ACADEMIA PARTNERSHIPS AND PATHWAYS” (IAPP)

Call Reference FP7-PEOPLE-IAPP-2008

3.1.1. Introduction and objective of the action

This action seeks to open and foster dynamic pathways between public research organisations and private commercial enterprises, in particular SMEs, including traditional manufacturing industries, based on longer term co-operation programmes with a high potential for increasing knowledge-sharing and mutual understanding of the different cultural settings and skill requirements of both the industrial and academic sectors.

The action will be implemented through targeted and flexible support for human resources interactions within co-operation programmes between at least two organisations, one from each sector and from at least two different Member States or Associated countries.

3.1.2. Technical content/scope

Participants: Participants under this action are on the one hand, one or more universities/research centres and on the other, one or more enterprises, in particular SMEs, that propose a project based on a joint cooperation programme. Within this scheme, the industrial partners must be organisations operating on a commercial basis, i.e. companies gaining the majority of their revenue through competitive means with exposure to commercial markets, and will include incubators, start-ups and spin-offs, venture capital companies, etc. The different participants should be from at least two different Member or Associated countries. Above this minimum, the participation of *third countries* and of international organisations is foreseen under the conditions provided by the Rules for Participation⁴. The participants recruit and/or host eligible researchers and contribute directly to the implementation of longer-term cooperation programmes established between them in line with the objectives of this action.

Programme: Support is provided for the creation, development, reinforcement and execution of strategic partnerships based on a longer-term cooperation programme between the participants, aimed at knowledge sharing and inter-sector mobility, based on targeted human resources interaction. Such strategic research partnership projects can be co-ordinated either by an industrial or an academic participant.

The longer-term cooperation programme shall exploit complementary competences of the participants in the strategic partnership, as well as other synergies. The implementation of the co-operation programme will be realised by:

- Exchange of know-how and experience through inter-sector two-way secondments of research staff of the participants, with in-built return mechanisms, and also by

⁴ Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, page 1].

enabling these staff to attend events in a trans-national setting. All projects are expected to have staff exchange, normally in both directions;

- Recruitment by the participants of *experienced researchers* from outside the partnership for involvement in transfer of knowledge and/or in the training of researchers;
- Networking activities, organisation of workshops and conferences to facilitate sharing of knowledge and culture between the participants also in a wider setting, involving the participants' own research staff and external researchers. Where these events are open to researchers from outside the partnership, additional reimbursements are foreseen;

Given the compulsory nature of secondments and the optional nature of the recruitments it is not expected that external recruitments would ever exceed total secondments.

The duration of the programme to be supported will normally be between three and four years.

Eligible researchers: Exchange of research staff can be for *early-stage* or *experienced researchers'* level and can also include technical and research managerial staff. To be eligible for exchange, staff members of a participant institution must have been active continuously for at least 1 year (full time equivalent) at that institution. The support granted to eligible researchers will be for periods of between two months to 2 years. The participant from which the exchanged researchers originate will have to secure by contract the commitment of its researchers to return after the exchange for at least one year in order to further develop the acquired knowledge.

Newly recruited staff from outside of the partnership must be *experienced researchers*, and must be nationals of a Member State, Associated country or *third country* other than the country of the premises of the host organisation where they will carry out their project. They can be recruited for a period of between one and two years.

Community Contribution, Rates and Evaluation Criteria: Community support may take one or more of the following forms:

- Cost related to staff secondments between both sectors within the partnership;
- Costs related to the temporary hosting in either sector of *experienced researchers* recruited from outside the partnership;
- Networking costs and the organisation of workshops and conferences enhancing the inter-sector experience and knowledge exchange of both staff members from the participant organisations and researchers from outside the partnership;
- As an SME-specific measure a contribution to small equipment related to their participation in the co-operation. This equipment must be specifically required to execute the joint project, and the total contribution to the costs should not exceed 10% of the total Community contribution to the project.

The Community rates for this action are based on the Funding Scheme “Support for training and career development of researchers”, and are set out in Annex 3 of this Work Programme. The evaluation, selection and award criteria are set out in Annex 2.

Rules of mobility: As a general rule, trans-national mobility is a requisite for the exchange of staff and for new recruitments. 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 date of selection by the host institution. Short stays such as holidays are not taken into account.

As far as international European interest organisations or international organisations located in any of the Member States or Associated countries are concerned, this mobility 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 date of selection in the same appointing international organisation.

However, in the context of a collaboration established between more than two participants, a limited level inter-sector mobility may be allowed between two participants in the same Member or Associated country, within the frame of the overall coherent knowledge sharing plan for all the participants and up to a maximum of 30% of the researchers' months in the project. *Returning Researchers* are eligible.

3.1.3. Expected impact of the action

Projects under this action are expected to structure effectively and significantly enhance the interaction at human resources level between research organisations in the public and private sector, in terms of knowledge sharing and broad skills development, bringing closer together their different cultures and expectation patterns, with a view to more effectively advancing the contributions of research to Europe's knowledge economy and society.

Activity 4: “International Dimension”

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

Call Reference FP7-PEOPLE-IOF-2008

4.1.1. Introduction and objective of the action

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

4.1.2. Technical content/scope

Projects and participants: This action consists of financial support to individual mobility projects presented by *experienced researchers* in liaison with host organisations in the Member States or Associated countries. The contracts will be concluded with the return host organisations of the Member States or the Associated countries for a total duration of up to 3 years. It is mandatory for the project to include a coherent research programme for the total duration of the contract, of which an initial outgoing phase, of between 1 and 2 years, is to be spent in a distinct legal entity in a *third country* (“partner organisation”) and a mandatory re/integration phase of 1 year within the contracting organisation (“return host organisation”) in a Member State or Associated country. The reintegration phase will normally commence directly after the outgoing phase.

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

Each researcher will establish, together with her/his personal supervisor in the return host organisation, a Personal Career Development Plan comprising his/her training needs

(including complementary skills) and scientific objectives and later on report upon the success to which these objectives were met. In this way the researchers will be encouraged to play an active role in shaping their own training programme and professional development.

Eligible researchers: Researchers must be nationals of a Member State or Associated country.

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

On the date of the relevant deadline for submission of proposals, researchers addressed under this action are those based on the definition of *experienced researchers*. As the action is directed at life-long training and career development, it is however expected that the researchers will typically have a more senior profile in terms of experience.

Rules of mobility and conditions of nationality applicable to eligible researchers: At the deadline for submission of proposals, researchers must not have resided or carried out their main activity (work, studies, etc) in the outgoing country for more than 12 months in the 3 years immediately prior to the reference deadline for submission. Short stays such as holidays are not taken into account.

Community Contribution, Rates and Evaluation Criteria: The Community contribution and rates under this action are based on the Funding Scheme “Support for training and career development of researchers”, set out in Annex 3 of this Work Programme. The evaluation, selection and award criteria are set out in Annex 2.

4.1.3. Expected impact of the action

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

4.2 MARIE CURIE ACTION: “INTERNATIONAL INCOMING FELLOWSHIPS” (IIF)

Call Reference FP7-PEOPLE-IIF-2008

4.2.1. Introduction and objective of the action

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

If the researcher originates from one of the International Cooperation Partner Countries (see Annex 1), the scheme may include provision to assist fellows to return to their country of origin, thus contributing to establish sustainable cooperation between these countries and European research organisations.

4.2.2. Technical content/scope

Projects and participants: The action provides financial support to individual research projects presented by the incoming *experienced researchers* in liaison with a legal entity (“host organisation”) in a Member State or an Associated country, as well as possibly a “return host organisation” if the researcher’s country of origin is an International Cooperation Partner Country.

In the latter case, the projects may include a return phase in the country of origin, within the framework of an overall and coherent project directed to the development of a mutual interest between the Member States/Associated countries and the *third countries* concerned.

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

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

Incoming Phase

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

Possible Return Phase

The possible return phase of one year aims at the application, in their country of origin, of the experience gained during their period of international mobility by the researchers of one of the International Cooperation Partner Countries (see list of countries in Annex 1). In this case, the proposal must include a description of a possible return phase in an identified return host organisation.

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

A contract will be issued with the return host organisation, which will commit itself to assure an effective return of the researcher. The grant is to be used as a contribution to the scientific costs relating to the researcher’s project at the return host.

Eligible researchers: *Third country* researchers are eligible for this action, except those who are considered *assimilated nationals* at the relevant deadline for submission.

On the date of the relevant deadline for submission of proposals, researchers addressed under this action are those based on the definition of *experienced researchers*. It is however expected that the researchers will typically have a more senior profile in terms of experience.

Rules of mobility and conditions of nationality applicable to eligible researchers: At the deadline for submission of proposals, researchers must not have resided or carried out their main activity (work, studies, etc) in the country of the incoming host organisation for more than 12 months in the 3 years immediately prior to the reference deadline for submission. Short stays such as holidays are not taken into account.

Community Contribution, Rates and Evaluation Criteria: The Community contribution and rates under this action are based on the Funding Scheme “Support for training and career development of researchers”, set out in Annex 3 of this Work Programme. The evaluation, selection and award criteria are set out in Annex 2.

4.2.3. Expected impact of the action

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

4.3 MARIE CURIE ACTION: “INTERNATIONAL REINTEGRATION GRANTS” (IRG)

Call Reference FP7-PEOPLE-IRG-2008

4.3.1. Introduction and objective of the action

The objective of this action is to reinforce the attractiveness of Europe by encouraging European researchers who have carried out research outside Europe for at least 3 years, to reintegrate in a Member State or in an Associated country in order to contribute to European research and transfer the knowledge they have acquired in a *third country*, by offering them the opportunity to capitalise in Europe on their experience. It is aimed at countering European brain drain to *third countries*. It should also allow the development of lasting co-operation with the scientific and/or industrial environment of the *third country* from which they have returned.

4.3.2. Technical content/scope

Projects and participants: This action consists of financial support during at least 2 and up to 4 years for professional (re)integration projects in the research area in a host organisation in a Member State or Associated country. The project can, amongst other things, address research activities, training, teaching, transfer of knowledge, commercial exploitation, diffusion, development of co-operation with the scientific and/or industrial sector of the *third country* from which the researcher is returning.

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

For selected projects a contract is issued with the reintegration host organisation, which will commit itself to assure an effective and lasting professional integration of the researcher for a period of at least 2 and up to 4 years. Evidence that the researcher will be integrated in the host organisation on this basis for a longer term will be positively taken into account during evaluation.

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

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

Eligible researchers: This action will be open to *experienced researchers* from the Member States or Associated countries, who at the date of submission have been active in research in a *third country* for at least 3 years and who will return to a Member State or Associated country.

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

On the relevant cut-off date, researchers addressed under this action are those based on the definition of *experienced researchers*.

Community Contribution, Rates and Evaluation Criteria: The grant which can cover a period of 2 to 4 years is a flat-rate contribution to the salary costs of the researcher, and/or to the research costs relating to the researcher's project at the reintegration host, such as salary costs of other staff (e.g. assistants, technicians), travel costs, consumables, patent costs and publication costs. The Community rates for this action are based on the Funding Scheme "Support for training and career development of researchers", and are set out in Annex 3 of this Work Programme. The evaluation, selection and award criteria are set out in Annex 2.

4.3.3. Expected impact of the action

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

4.4 MARIE CURIE ACTION: "INTERNATIONAL RESEARCH STAFF EXCHANGE SCHEME" (IRSES)

Call Reference FP7-PEOPLE-IRSES-2008

4.4.1 Introduction and objective of the action

The Marie Curie International Staff Exchange Scheme is a new implementation modality aiming at strengthening research partnerships through staff exchanges and networking activities between European research organisations and organisations from countries with which the Community has an S&T agreement or are in the process of negotiating one¹³, and countries covered by the European Neighbourhood policy. Compared to existing Marie Curie actions, which provide mobility possibilities to individual researchers, this new action will provide support to research organisations to establish or reinforce long-term research co-operation through a coordinated joint programme of exchange of researchers for short periods.

4.4.2 Technical content/scope

¹³ See ANNEX I to this Work Programme for countries eligible for the IRSES scheme. List of countries with S&T agreement also available at http://ec.europa.eu/research/iscp/index_en.cfm?page=Countries.

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

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

Eligible programmes and eligible staff

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

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

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

The grant agreement will be concluded with one of the participants located in the Member State or associated Country, which will be the beneficiary while the other members of the partnership are defined as partner organisations.

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

Community Contribution

In principle, the scheme is intended to provide a balanced exchange of researchers between the European partners and the Third Country partner organisations, each respectively funding the mobility costs of their “outgoing” researchers.

The available Community funds will cover a subsistence allowance of the outgoing European researchers (including travel costs) of EUR 1 800/researcher/month¹⁴.

As far as ICPC countries, and in particular countries covered by the European Neighbourhood policy, are concerned, in specific and well justified cases, a Community contribution towards travel and subsistence for these participants may be envisaged.

4.4.3 Expected impact

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

¹⁴ Third Country partner organisations may apply their own rates for their seconded staff

4.5 INTERNATIONAL ACTIVITIES NOT IMPLEMENTED THROUGH CALLS FOR PROPOSALS

Scientific Diasporas

Introduction and objectives

The **European Researchers Abroad-Link (ERA-LINK)** action is to continue to provide European researchers abroad with information focussing on and keeping them systematically in touch with developments in research policies and activities at European, Member State and associated country level. The action also is to further establish links from Europe with expatriate European researchers with a view to promoting collaborations with the European research community.

A new action, **Non-European Researchers in Europe-Link (NERE-LINK)**, aims at promoting interaction between non-European researchers from the same region active in Europe, as well as with their countries/regions of origin. The action aims to enhance the attractiveness of Europe to non-European researchers, and foster collaborative research relationships beneficial to both the Member States and associated countries on the one hand and the countries and regions of origin on the other hand.

Implementation

The actions, implemented through public procurement, under the funding scheme "Coordination and support actions" will (i) continue support to the full-scale ERA-LINK activities in the United States; (ii) expand ERA-LINK activities to other, in particular industrialised and emerging regions and countries where significant numbers of European researchers are active, and iii) explore the feasibility and possible approach for NERE-LINK. The latter will be explored through surveys, feasibility studies, ad hoc meetings and seminars. Within the indicative budgetary outline below between four and six service contracts are foreseen in the context of framework contracts, the procedures for which are to be concluded in the first half of 2008 for the first two activities mentioned below and in the second half for the third activity.

- | | |
|--|-------------|
| • Continuation of ERA-LINK in the USA | EUR 260 000 |
| • Expansion ERA-LINK activities to other countries/world regions | EUR 460 000 |
| • Development phase NERE-LINK | EUR 280 000 |

Expected impact of the action

The reinforcement of contacts with European researchers abroad under this action is expected to strengthen the potential of Europe to establish more international research collaboration and the possibility of re-attracting researchers that have left Europe. The initial phase of NERE-LINK will provide scenarios on how to foster the presence of active non-European researchers in Europe, and at the same time foster their contacts with research actors in their home countries/regions.

Activity 5: "Specific Actions"

5.1 MARIE CURIE ACTION: "RESEARCHERS' NIGHT" (NIGHT)

Call Reference FP7-PEOPLE-NIGHT-2008

5.1.1. Introduction and objective of the action

This action aims at supporting the efforts undertaken since 2005 in order to bring researchers closer to the larger public, with a view to enhancing their important role in society, and in particular within the daily life of citizens. The increasing success of these actions since 2005, the important impact, both in terms of number of people reached and the ratio of "investment/return" for this kind of action, justifies its annual frequency. The form of the call for proposals which was applied for the first time in 2006 allows for a higher consistency between the actions supported, regarding their scale as well as the audience targeted and the messages delivered.

5.1.2. Technical content/scope

Projects and participants: It is intended to ensure as large a geographical coverage as possible, involving the maximum number of Member States and Associated countries. Participants can be any legal entity of the Member States and Associated countries, if relevant constituting a partnership at regional, national or international level. The projects will be selected for funding by a panel of external independent experts. Preference should be given to those projects within which a regional, local or national financial involvement exists (without excluding those requesting a 100 % funding). Activities organised will have to be focused on the public at large, and be organised in a relaxed and festive context, the researchers being actively involved and directly put in contact with the public.

Community Contribution, Rates and Evaluation Criteria: The grant will cover a period up to 7 months (covering the necessary awareness campaign, the activities during the night itself and the impact assessment period). Eligible costs will be those necessary for the completion of the action. The Community contribution rates for this action are based on the "Coordination and support action" funding scheme and the evaluation criteria are set out in Note 2 of Annex 2.

5.1.3. Expected impact of the action

The expected impact of this action consists of continuing to tackle the existing stereotypes about researchers and their profession and to make them perceived as "ordinary people" by the public at large. Such a trend is already tangible through the increasing public participation in the Researchers' nights since 2005 edition. One side-effect should also be to convince young people that scientific careers are fascinating and to stimulate their embarkation on scientific orientations

5.2 SPECIFIC ACTIONS NOT IMPLEMENTED THROUGH CALLS FOR PROPOSALS¹⁵

Under the activity heading "Specific actions", different initiatives aim to respond to the objective of reinforcing human resources in research in Europe and of stimulating a culture of mobility and career development. A number of activities are foreseen that are not subject to open calls for proposals. These activities will be implemented by the Commission through the funding scheme "Coordination and support actions", either: by public procurement, through calls for tender or through a specific contract based on a framework contracts under Article 88 of the Financial Regulation and Article 117 of the Implementing Rules; or by a grant to an identified beneficiary in the sense of Article 14(a) of the FP7 Rules for Participation¹⁶. The implementation method to be used is

¹⁵ All amounts mentioned in this section 5.1 concern the budget for the year 2008.

¹⁶ Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, page 1].

given in the description for each of the below topics. The essential selection and award criteria are contained in Annex 2, Note 2, while the upper funding limits are in accordance with those set out in Article 33 of the FP7 Rules for Participation.¹⁶

It should be noted that a number of activities covered under this activity heading "specific actions" and of the "scientific diasporas" activity under the Activity heading "International dimension", covered at the end of the previous Chapter, have been regrouped and re-branded from June 2008 onwards under the common name of "EURAXESS – Researchers in motion". As part of this exercise the ERA-MORE Network has become the EURAXESS Services Network; the European Researcher's Mobility Portal has become the EURAXESS Jobs Portal; the activities to support the implementation of the European Charter for Researchers and Code of Conduct for their Recruitment have become the EURAXESS Rights activity; and ERA-LINK and NERE-LINK are regrouped under the EURAXESS Links activity (*Abroad* and *In Europe*, respectively). Despite this development will have taken place before the adoption of this revised version of the 2008 Work Programme, the previous denominations for the actions have been maintained for the sake of ease of reference to the original 2008 Work Programme. In the 2009 Work Programme the new denominations will be used fully.

5.2.1. Mobility Strategy and Career Development

5.2.1.1 The European Network of Mobility Centres ERA-MORE and the Researchers' Mobility Portal

Objective

- To enhance the operation, enlarge the geographic coverage, improve the visibility and stimulate the trans-national dimension of the European Network of Mobility Centres, ERA-MORE.
- To improve the visibility and support the sustainability of the European Researchers' Mobility Portal project.

Implementation

- A number of measures, totalling EUR 1 480 000 will be implemented:
 - ERA-MORE networking activities: annual conference, extranet maintenance, workshops, ad hoc training, implemented under a framework contract (total indicative budget EUR 700 000); indicatively two to four service contracts; procedures normally to be conducted in the second half of 2008;
 - ERA-MORE structural training activities, implemented under a framework contract (total indicative budget EUR 200 000); indicatively one or two service contracts; procedures normally to be conducted in the first half of 2008;
 - ERA-MORE evaluation; implemented under a framework contract (indicative budget EUR 200 000); indicatively one service contract; procedures normally to be conducted in the first half of 2008;
 - Day-to-day running, regular updating of data, qualitative check of content and maintenance for the European Researchers' Mobility Portal and interconnected national portals, implemented under framework contracts (total indicative budget EUR 350 000); indicatively two service contracts; procedures normally to be conducted in the first half of 2008; Feasibility study on technical centralisation of

National Researcher's Mobility Portals, implemented under a framework contract (indicative budget EUR 30 000); indicatively one service contract; procedure normally to be conducted in the second half of 2008;

5.2.1.2 Mobility data

Objective

To improve European data collection through a researchers' information system, that will serve as a dynamic framework for analysing relevant trends as regards researchers' career paths and flows of mobility.

Implementation

- Building on the IPTS-IISER project, an 18 month project on a researchers' information system is to be implemented, in close cooperation with Eurostat, Member States and OECD, providing “ready to use” results based on updates of fiches concerning 10 indicators, on field studies as well as on studies dedicated to international mobility. The project is also to monitor European and national studies and provide expertise for countries and associations developing surveys, which in turn will provide data; implemented through a call for tender (total indicative amount EUR 1 500 000); indicatively one service contract; procedure normally to be conducted in the first half of 2008.
- The DOC-CAREERS project has so far looked into doctoral training for the employability of researchers through transferable skills acquisition. The next phase of DOC.CAREERS aims at widening the dialogue on good practices initiated towards the broader audience of the European University Association, comprising some 800 higher education institutions, and will result in organising regional workshops discussing how to implement in practise for the local context the recommendations of DOC.CAREERS; implemented by the European University Association (EUA), rue d'Egmont 13, 1000 Brussels (budget EUR 295 000); second half of 2008.

5.2.1.3 Legal and administrative mobility obstacles

Objective

To contribute to the further removal of legal and administrative obstacles to mobility of researchers.

Implementation

Studies on legal and administrative arrangements including on issues regarding social security and taxation; implemented through calls for tender (indicative budget EUR 300 000); indicatively two service contracts; procedures normally to be conducted in the first half of 2008.

5.2.1.4 Career Development issues

Objective

To advance the effective implementation of the principles of the European Charter for Researchers and Code of Conduct for their Recruitment.

Implementation

Training and missions of “Charter and Code Promoters”, implemented through framework contract(s); (indicative budget EUR 250 000); indicatively one or two service contracts; procedures normally to be conducted in the second half of 2008.

5.2.1.5 Policy monitoring activities linked to the European researchers' partnership

Objective

Initiating improvements on information concerning policy developments in Member states and their effect at the level of research organisations, as well as development of an improved knowledge base for future policy developments

Implementation

Through a framework contract for a pilot project (indicative budget EUR 120 000) with a duration of up to one year with an annual progress report; indicatively one service contract; procedure to be conducted in the second half of 2008.

5.2.2 Communication

Objective

To raise public awareness of the researchers' careers in Europe, of the obstacles to mobility and of the financial and other policy instruments available thus implementing also the Deloitte studies' recommendations on ERA-MORE, the European Researcher's Mobility Portal and the implementation of the principles contained in the Commission's Recommendation on the European Charter for Researchers and the Code of Conduct for their Recruitment.

Implementation

The following specific communication actions, for a total value of EUR 195 000, will be implemented:

- Awareness raising campaign* for ERA-MORE, European Researcher's Mobility Portal, Charter and Code, and ERA-link, implemented through framework contracts (indicative budget EUR 150 000); indicatively one service contract; procedure normally to be conducted in the first half of 2008;
- Electronic Newsletter "Europe4Researchers", implemented through Framework contract(s); (indicative budget EUR 45 000); indicatively one service contract; procedures normally to be conducted until the autumn of 2008.

In addition to the above specific actions not implemented through calls for proposals, the Commission will appoint independent experts to assist with the evaluation of proposals in accordance with article 17 of the Rules for Participation. In addition independent experts will be appointed to assist the Commission and the participants to indirect actions financed under FP7 and previous framework programmes with the review of running actions.

* Linked to the regrouping and re-branding of several policy activities under the banner of EURAXESS – Researchers in motion as referred to in the introduction of chapter 5.2

SUMMARY - 2008 BUDGET

1. Activities included in the 2007 work programme, drawing on the 2008 budget

Actions subject to calls for proposals	Budget 2008 (EUR million)
Co-funding of Regional, National, and International Programmes (COFUND)	65
Total	65

Actions not subject to open calls for proposals	Budget 2008 (EUR million)
Mobility data	0.5
Total	0.5

2. Activities included in the 2008 work programme with 2008 budget

Actions subject to calls for proposals	Budget 2008 (EUR million)
1. Initial Training of Researchers	
Initial Training Networks (ITN)	185
2. Life-long Training and Career Development	
Intra-European Fellowships for Career Development (IEF)	75
European Re-integration grants (ERG)	7
3. Industry-Academia Partnerships and Pathways	
Industry-Academia Partnerships and Pathways (IAPP)	45
4. International dimension	
International Outgoing Fellowships for Career Development (IOF)	25
International Incoming Fellowships (IIF)	25
International Re-integration grants (IRG)	17
International Research Staff Exchange Scheme (IRSES)	25
5. Specific actions	
Researchers' Night (NIGHT)	3
Subtotal	407
Actions not subject to open calls for proposals	4.64
Expert Evaluators	6.02
Total	417.66

3. Activities included in the 2008 work programme, drawing on the 2009 budget

Actions subject to calls for proposals	Budget 2009 (EUR million)
1. Initial Training of Researchers Initial Training Networks (ITN)	145*
2. Life-long Training and Career Development Co-funding of Regional, National, and International Programmes (COFUND)	75*
Total	220

* 2009 figures given for information purposes, and under the condition that the preliminary draft budget for 2009 is adopted without modifications by the budgetary authority.

4. All activities with 2008 budget (EUR million)

Actions subject to calls for proposals	472
Actions not subject to open calls for proposals	5.14
Expert and Reviewer Evaluators	6.02
Total	483.16

Actions not subject to open calls for proposals

Actions not subject to open calls for proposals	Budget 2008 (EUR million)
Scientific Diasporas	1.0*
ERA-MORE/Researcher's Mobility Portal	1.48
Mobility data	1.795
Mobility related obstacles	0.30
Career development issues	0.25
Policy monitoring	0.12
Communication	0.195
Total	5.14

*part of Action "4."International dimension"

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

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

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

III IMPLEMENTATION OF CALLS

THE 2008 MARIE CURIE ACTIONS ROADMAP

(Listed by closing dates)

Action	Call ID	Call Opens	Call Closes/Cut-off dates
NIGHT Researchers' Night	FP7-PEOPLE-NIGHT-2008	30 November 2007	5 March 2008
CO-Funding of Regional, national & International Progs	FP7-PEOPLE-2007-2-3-COFUND	16 November 2007	13 March 2008
IAPP Industry Academia Partnerships & Pathways	FP7-PEOPLE-IAPP- 2008	30 November 2007	25 March 2008
IRSES International Staff Exchanges	FP7-PEOPLE-IRSES-2008	30 November 2007	28 March 2008
ERG European Reintegration Grants 1st cut off	FP7-PEOPLE-ERG- 2008	30 November 2007	3 April 2008
IRG International Reintegration Grant 1st cut off	FP7-PEOPLE-IRG-2008	30 November 2007	3 April 2008
IEF Intra-European Fellowships	FP7-PEOPLE-IEF- 2008	19 March 2008	19 August 2008
IIF International Incoming Fellowships	FP7-PEOPLE- IIF-2008	19 March 2008	19 August 2008
IOF International Outgoing Fellowship	FP7-PEOPLE-IOF-2008	19 March 2008	19 August 2008
ITN Initial Training Networks	FP7-PEOPLE-ITN-2008	4 April 2008	2 September 2008
ERG European Reintegration Grants 2nd cut off	FP7-PEOPLE-ERG- 2008	30 November 2007	8 October 2008
IRG International Reintegration Grant 2nd cut off	FP7-PEOPLE-IRG-2008	30 November 2007	8 October 2008
CO-Funding of Regional, national & International Progs	FP7-PEOPLE-COFUND- 2008	19 November 2008	19 February 2009

Activity 1: “Initial Training of Researchers”

1.1. MARIE CURIE INITIAL TRAINING NETWORKS

- **Call identifier:** *FP7-PEOPLE-ITN-2008*
- **Date of publication:** 4 April 2008
- **Deadline:** 2 September 2008 at 17:00:00 Brussels local time
- **Indicative budget:** *EUR 330 million (of which EUR 185 million of the 2008 budget and 145 million of the 2009 budget¹⁹)*. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

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

- **Evaluation procedure:**

¹⁹ An amount of 145 million has been allocated to this call budget from the 2009 budget. This is under the condition that the preliminary draft budget for 2009 is adopted without modifications by the budget authority.

- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme
- The evaluation shall follow a single evaluation following a single proposal submission.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- The distribution of the indicative budget of the call over the scientific disciplines will be based on the number of eligible proposals received, which are allocated to one of 8 scientific panels ⁶. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated ⁷ in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.
- **Indicative evaluation and contractual timetable:**
 - Evaluation results are estimated to be available 4 months after the relevant deadline for submission.
 - Contract signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.
The forms of grants which will be offered are specified in Annex 3 to this Work Programme.

Activity 2: “Life-long Training and Career Development”

2.1 MARIE CURIE INTRA-EUROPEAN FELLOWSHIPS FOR CAREER DEVELOPMENT

- **Call identifier:** *FP7-PEOPLE-IEF-2008*
- **Date of publication:** 19 March 2008
- **Deadline:** 19 August 2008 at 17:00:00 Brussels local time
- **Indicative budget:** *EUR 75 million* of the 2008 budget. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

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

- **Evaluation procedure:**
 - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme

⁶ The Marie Curie panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**.

⁷ Measured as proposals having passed all relevant evaluation thresholds

- The evaluation shall follow a single evaluation following a single proposal submission.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- The distribution of the indicative budget of the call over the scientific disciplines will be based on the number of eligible proposals received, which are allocated to one of 8 scientific panels ⁶. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated ⁷ in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.
- **Indicative evaluation and contractual timetable:**
 - Evaluation results estimated to be available within some 4 months after the relevant deadline for submission.
 - Contract signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.
The forms of grants which will be offered are specified in Annex 3 to this Work Programme.

2.2 MARIE CURIE EUROPEAN RE-INTEGRATION GRANTS

- **Call identifier:** *FP7-PEOPLE-ERG-2008*
- **Date of publication:** 30 November 2007
- **Deadline:** Continuous submission with “cut-off dates” for evaluation of proposals received until then on 3 April 2008 and 8 October 2008, for both dates at 17:00:00 Brussels local time.
- **Indicative budget:** *EUR 7 million of the 2008 budget (of which approximately 1/2 for each evaluation round following the cut-off dates).* The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

ACTION	Funding Schemes
<i>Marie Curie European Reintegration Grants</i>	<i>Support for training and career development of researchers</i>

- **Evaluation procedure:**
 - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme
 - The evaluation shall follow a single evaluation following a single proposal submission.
 - Proposals will not be evaluated anonymously.

⁶ The Marie Curie panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life sciences **LIF**, Mathematics **MAT**, Physics **PHY**

⁷ Measured as proposals having passed all relevant evaluation thresholds

- Proposals will be evaluated on a continuous basis and selected on an individual basis.
- Proposals may be evaluated remotely.
- There will be a single ranking list.
- **Indicative evaluation and contractual timetable:**
 - Evaluation results estimated to be available within 4 months following relevant cut-off date.
 - Contract signature: expected from 6 months after the relevant cut-off date.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.
The forms of grants which will be offered are specified in Annex 3 to this Work Programme.

2.3 MARIE CURIE CO-FUNDING OF REGIONAL, NATIONAL AND INTERNATIONAL PROGRAMMES

- **Call identifier:** *FP7-PEOPLE-2007-2-3-COFUND* ²⁰
- **Date of publication:** 16 November 2007
- **Deadline:** 13 March 2008 at 17:00:00 Brussels local time
- **Indicative budget:** *EUR 65 million* of the 2008 budget. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

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

- **Evaluation procedure:**
 - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme
 - The evaluation shall follow a single evaluation following a single proposal submission.
 - Proposals will not be evaluated anonymously.
 - Proposals may be evaluated remotely.
 - The distribution of the indicative budget of the call between panel (A) "Existing trans-national fellowship programmes" and panel (B) "New fellowship programmes with transnational mobility" will be based on the requested Community contribution of the proposals positively evaluated. If the budget allocated to one of the panels exceeds the requirements of all proposals positively evaluated ⁷ in that panel, the excess budget will be transferred to the other panel. Equally, if the allocated funding to one panel is insufficient to fund the highest ranked proposal in that panel, necessary

²⁰ This fiche replaces the one in previous Work Programme. Note that the 2007-2008 Work Programme will not apply to this call, but the current 2008 Work Programme.

⁷ Measured as proposals having passed all relevant evaluation thresholds

budget will be transferred from the other panel in order to ensure that the highest ranked proposal can be funded.

- **Indicative evaluation and contractual timetable:**
 - Evaluation results estimated to be available within 4 months following the deadline for submission.
 - Contract signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement

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- **Call identifier:** *FP7-PEOPLE- COFUND-2008*
 - **Date of publication:** 19 November 2008¹⁷
 - **Deadline:** 19 February 2009 at 17:00:00 Brussels local time¹⁸
 - **Indicative budget:** *EUR 75 million* of the 2009 budget¹⁹. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of this call.
 - **Topics called:**

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

- **Eligibility criteria:**
 - Participants in the co-funding modality must be established in Member States or Associated Countries and are organisations falling under one of the following categories:
 - Public bodies, as defined in Article 2.13 of the Rules for Participation⁴, responsible for funding and managing fellowship programmes, e.g. ministries, state committees for research, research academies, councils or agencies;
 - Other bodies, including research organisations, as defined in Article 2.7 of the Rules for Participation⁴, that finance and manage fellowship programmes either with an official mandate or recognised by public authorities, such as agencies established by governments under private law with a public service mission, charities, etc.;

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

¹⁸ The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

¹⁹ An amount of EUR 75 million has been allocated to this call budget from the 2009 budget. This is under the condition that the preliminary draft budget for 2009 is adopted without modification by the budgetary authority.

⁴ Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, page 1].

International organisations as defined in Article 2.10 and 11 of Rules for Participation⁴ that run comparable schemes at European level as part of their mission.

- **Evaluation procedure:**
 - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme.
 - The evaluation shall follow a single evaluation following a single proposal submission.
 - Proposals will not be evaluated anonymously.
 - Proposals may be evaluated remotely.
 - The distribution of the indicative budget of the call between panel (A) "Existing trans-national fellowship programmes" and panel (B) "New fellowship programmes with transnational mobility" will be based on the requested Community contribution of the proposals positively evaluated. If the budget allocated to one of the panels exceeds the requirements of all proposals positively evaluated ⁷ in that panel, the excess budget will be transferred to the other panel. Equally, if the allocated funding to one panel is insufficient to fund the highest ranked proposal in that panel, necessary budget will be transferred from the other panel in order to ensure that the highest ranked proposal can be funded.
 - For ex aequo proposals, they will be prioritised according to the scores they have been awarded for the criterion "Relevance and Impact". When these scores are equal, priority will be based on scores for the criterion "Quality of the selection process for the fellows". When these scores are equal, priority will be based on scores for the criterion "Implementation – Management of the programme".
- **Indicative evaluation and contractual timetable:**
 - Evaluation results: estimated to be available within 4 months following the relevant deadline for submission.
 - Contract signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.
The forms of grant and the maximum reimbursement rates which will be offered are specified in the core text (II.2.3) of the People work programme.

Activity 3: “Industry-Academia Partnerships and Pathways”

3.1. MARIE CURIE INDUSTRY-ACADEMIA PARTNERSHIPS AND PATHWAYS

- **Call identifier:** *FP7-PEOPLE-IAPP-2008*
- **Date of publication:** 30 November 2007
- **Deadline:** 25 March 2008 at 17:00:00 Brussels local time
- **Indicative budget:** *EUR 45 million* of the 2008 budget. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

ACTION	Funding Schemes
<i>Marie Curie Industry-Academia Partnerships and Pathways</i>	<i>Support for training and career development of researchers</i>

- **Evaluation procedure:**
 - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme
 - The evaluation shall follow a single evaluation following a single proposal submission.
 - Proposals will not be evaluated anonymously.
 - Proposals may be evaluated remotely.
 - The distribution of the indicative budget of the call over the scientific disciplines will be based on the number of eligible proposals received, which are allocated to one of 8 scientific panels ⁶. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated⁷ in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.
- **Indicative evaluation and contractual timetable:**
 - Evaluation results are estimated to be available 4 months after the relevant deadline for submission.
 - Contract signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement
The forms of grants which will be offered are specified in Annex 3 to this Work Programme

Activity 4: “International Dimension”

4.1 MARIE CURIE INTERNATIONAL OUTGOING FELLOWSHIPS FOR CAREER DEVELOPMENT

- **Call identifier:** *FP7-PEOPLE-IOF-2008*
- **Date of publication:** 19 March 2008
- **Deadline** 19 August 2008 at 17:00:00 Brussels local time
- **Indicative budget:** *EUR 25 million* of the 2008 budget . The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

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

⁶ The Marie Curie panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**

⁷ Measured as proposals having passed all relevant evaluation thresholds

- **Evaluation procedure:**
 - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme.
 - The evaluation shall follow a single evaluation following a single proposal submission.
 - Proposals will not be evaluated anonymously.
 - Proposals may be evaluated remotely.
 - The distribution of the indicative budget of the call over the scientific disciplines will be based on the number of eligible proposals received, which are allocated to one of 8 scientific panels ⁶. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated ⁷ in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.
- **Indicative evaluation and contractual timetable:**
 - Evaluation results estimated to be available within some 4 months after the deadline for submission.
 - Contract signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.
The forms of grants which will be offered are specified in Annex 3 to this Work Programme.

4.2 MARIE CURIE INTERNATIONAL INCOMING FELLOWSHIPS

- **Call identifier:** *FP7-PEOPLE-IIF-2008*
- **Date of publication:** 19 March 2008
- **Deadline:** 19 August 2008 at 17:00:00 Brussels local time
- **Indicative budget:** *EUR 25 million* of the 2008 budget. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

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

- **Evaluation procedure:**
 - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme

⁶ The Marie Curie panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**

⁷ Measured as proposals having passed all relevant evaluation thresholds

- The evaluation shall follow a single evaluation following a single proposal submission.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- The distribution of the indicative budget of the call over the scientific disciplines will be based on the number of eligible proposals received, which are allocated to one of 8 scientific panels ⁶. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated ⁷ in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.
- **Indicative evaluation and contractual timetable:**
 - Evaluation results estimated to be available within some 4 months after the deadline for submission.
 - Contract signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement
The forms of grants which will be offered are specified in Annex 3 to this Work Programme

4.3 MARIE CURIE INTERNATIONAL REINTEGRATION GRANTS

- **Call identifier:** *FP7-PEOPLE-IRG-2008*
- **Date of publication:** 30 November 2007
- **Deadline:** Continuous submission with “cut-off dates” for evaluation of proposals received until then on 3 April 2008 and 8 October 2008 for both dates at 17:00:00 Brussels local time.
- **Indicative budget:** *EUR 17 million* of the 2008 budget (*of which approximately ½ is for each evaluation round following the cut-off dates*). The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

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

- **Evaluation procedure:**
 - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme

⁶ The Marie Curie panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**

⁷ Measured as proposals having passed all relevant evaluation thresholds

- The evaluation shall follow a single evaluation following a single proposal submission.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- There will be a single ranking list.
- **Indicative evaluation and contractual timetable:**
 - Evaluation results estimated to be available within some 4 months after the relevant cut-off date.
 - Contract signature: expected from within 6 months after the relevant cut-off date.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.
The forms of grants which will be offered are specified in Annex 3 to this Work Programme.

4.4 MARIE CURIE INTERNATIONAL RESEARCH STAFF EXCHANGE SCHEME

- **Call identifier:** *FP7-PEOPLE-IRSES-2008*
- **Date of publication:** 30 November 2007
- **Deadline:** 28 March 2008 at 17:00:00 Brussels local time
- **Indicative budget:** *EUR 25 million* of the 2008 budget . The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

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

- **Evaluation procedure:**
 - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme
 - The evaluation shall follow a single evaluation following a single proposal submission.
 - Proposals will not be evaluated anonymously.
 - Proposals may be evaluated remotely.
 - There will be a single ranking list.
- **Indicative evaluation and contractual timetable:**
 - Evaluation results estimated to be available within some 6 months after the deadline for submission.
 - Contract signature: expected from within 9 months after the relevant deadline for submission.

- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement. The forms of grants which will be offered are specified in Annex 3 to this Work Programme.

Activity 5: “Specific Actions”

5.1 MARIE CURIE RESEARCHERS' NIGHT

- **Call identifier:** *FP7-PEOPLE-NIGHT-2008*
- **Date of publication:** 30 November 2007
- **Deadline:** 05 March 2008 at 17.00:00 Brussels local time
- **Indicative budget:** *EUR 3 million* of the 2008 budget. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

ACTION	Funding Schemes
<i>Researchers' Night 2008</i>	<i>Coordination and support actions (support)</i>

- **Evaluation procedure:**
 - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this Work Programme
 - The evaluation shall follow a single evaluation following a single proposal submission.
 - Proposals will not be evaluated anonymously.
 - Proposals will be selected on an individual basis.
 - Proposals may be evaluated remotely.
 - There will be a single ranking list.
- **Indicative evaluation and contractual timetable:**
 - Evaluation results estimated to be available within 1 month following the deadline for submission.
 - Contract signature: expected from within 4 months after the deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement

IV FUTURE DIRECTIONS OF THE WORK PROGRAMME

In principle, 2009 will see a continuation of the main Marie Curie Actions of 2008. At this stage no new Marie Curie Actions are envisaged. The Marie Curie Actions, and in particular the two new actions implemented for the first time in 2008, COFUND and IRSES, will be carefully monitored, to identify the possible need for adaptations.

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Moreover, in the context of the recently launched Green paper on the European Research Area, the Commission has launched a public consultation which is due to bring conclusions towards the end of the year. This may give rise to new initiatives, or shifts of emphasis or modifications of existing initiatives of the PEOPLE Programme.

ANNEXES

Annex 1.1: International Cooperation Partner Countries (ICPC)

List of

International Co-operation Partner Countries (ICPC)¹

ACP *

- AFRICAN

- Angola LM
- Benin L
- Botswana UM
- Burkina-Faso L
- Burundi L
- Cameroon LM
- Cape Verde LM
- Central African Republic L
- Chad L
- Comoros L
- Congo (Republic) LM
- Congo (Democratic Rep.) L
- Côte d'Ivoire L
- Djibouti LM
- Equatorial Guinea UM
- Eritrea L
- Ethiopia L
- Gabon UM
- Gambia L
- Ghana L
- Guinea L
- Guinea-Bissau L
- Kenya L
- Lesotho LM
- Liberia L
- Madagascar L
- Malawi L
- Mali L
- Mauritania L
- Mauritius UM
- Mozambique L
- Namibia LM
- Niger L
- Nigeria L
- Rwanda L
- Sao Tome and Principe L
- Senegal L
- Seychelles UM
- Sierra Leone L
- Somalia L
- South Africa² UM
- Sudan L
- Swaziland LM
- Tanzania L
- Togo L

- Uganda L
- Zambia L
- Zimbabwe L
- CARIBBEAN**
- Barbados UM
- Belize UM
- Cuba LM
- Dominica UM
- Dominican Rep. LM
- Grenada UM
- Guyana LM
- Haiti L
- Jamaica LM
- Saint Kitts and Nevis UM
- Saint Lucia UM
- Saint Vincent and Grenadines UM
- Suriname LM
- Trinidad and Tobago UM
- PACIFIC**
- Cook Islands UM
- Timor Leste L
- Fiji LM
- Kiribati LM
- Marshall Islands LM
- Micronesia, Federal States of LM
- Nauru UM
- Niue UM
- Palau UM
- Papua New Guinea L
- Samoa LM
- Solomon Islands L
- Tonga LM
- Tuvalu LM
- Vanuatu LM
- ASIA**
- Afghanistan L
- Bangladesh L
- Bhutan L
- Burma/Myanmar L
- Cambodia L
- China^{2**} LM
- Democratic People's Republic of Korea L
- India^{2**} L
- Indonesia LM
- Iran LM
- Iraq LM

- Lao People's Democratic Rep. L
- Malaysia UM
- Maldives LM
- Mongolia L
- Nepal L
- Oman UM
- Pakistan L
- Philippines LM
- Sri Lanka LM
- Thailand LM
- Vietnam L
- Yemen L
- EASTERN EUROPE AND CENTRAL ASIA (EECA)**
- Armenia³ LM
- Azerbaijan³ LM
- Belarus³ LM
- Georgia³ LM
- Kazakhstan LM
- Kyrgyz Republic L
- Moldova³ LM
- Russia^{2**} UM
- Tajikistan L
- Turkmenistan LM
- Ukraine^{2,3} LM
- Uzbekistan L
- LATIN AMERICA**
- Argentina² UM
- Bolivia LM
- Brazil^{2**} LM
- Chile² UM
- Colombia LM
- Costa Rica UM
- Ecuador LM
- El Salvador LM
- Guatemala LM
- Honduras LM
- Mexico² UM
- Nicaragua LM
- Panama UM
- Paraguay LM
- Peru LM
- Uruguay UM
- Venezuela UM
- MEDITERRANEAN PARTNER COUNTRIES (MPC)**
- Algeria³ LM
- Egypt^{2,3} LM
- Jordan³ LM
- Lebanon³ UM
- Libya³ UM

- Morocco^{2,3} LM
- Palestinian-administered areas³ LM
- Syrian Arab Rep.³ LM
- Tunisia^{2,3} LM
- WESTERN BALKAN COUNTRIES (WBC)**
- Bosnia-Herzegovina⁴ LM
- Kosovo⁵ LM

*In the 'Specific international cooperation actions', Africa can also be considered as a region on its own, while the Caribbean countries can also participate with Latin American and the Pacific countries with Asia.

**For participation in the 'Specific international cooperation actions' each of Brazil, China, India and Russia may be considered individually as a region on its own. Thus, the required two or more partners can be located in these countries. However, in this case, at least two different partners from different provinces, oblasts, republics or states within Brazil, China, India or Russia are necessary.

Income Groups:
L – Low-Income
LM – Lower-Middle Income
UM – Upper-Middle Income

¹ Legal entities established in countries against which the European Community under Articles 60 and 301 of the EC-Treaty has issued actions to interrupt or to reduce, in part or completely, economic relations, may only receive a financial contribution if it complies with these actions.

² Signed an agreement with the EC covering Science & Technology.

³ These countries are also part of the European Neighbourhood Policy (ENP).

⁴ Until the country becomes Associated to FP7

⁵ As defined by UNSC resolution 1244 of 10 June 1999.

Annex 1.2 Countries eligible for the International Research Staff Exchange Scheme (IRSES)²¹

Countries with EC International agreements on Science and Technology:

- Argentina, Australia, Brazil, Canada, China, Chile, Egypt, India, Japan, Rep. of Korea, Mexico, Morocco, New Zealand, Russia, South Africa, Tunisia, Ukraine, United States

Countries of the European Neighbourhood Policy (ENP):

- Eastern Europe & Central Asia (EECA)
 - Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine
- Mediterranean Partner Countries (MCP)
 - Algeria, Egypt, Jordan, Lebanon, Libya, Morocco, Palestinian-administrated areas, Syrian Arab Rep., Tunisia

²¹ and which are not Associated countries for the purpose of the FP7

Annex 2: Eligibility, evaluation, selection and award criteria

Eligibility criteria

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

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

Other eligibility criteria may be given in the Work Programme text and in the call text.

Evaluation criteria

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

- scientific and/or technological excellence;
- relevance to the objectives of these specific programmes²²;
- the potential impact through the development, dissemination and use of project results;
- the quality and efficiency of the implementation and management.

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

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

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

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

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

Notes:

1. Evaluation scores will be awarded for each of the criteria, and not for the sub-criteria. Each criterion will be scored out of 5.
2. Weightings and thresholds for the actions under the funding scheme “Support for Training and Career Development of Researchers” are contained in table 2.1 (per action). The threshold for individual criteria under the funding scheme “Coordination and Support Actions” will be 3, while no weightings will apply.

²² Relevance: A proposal may be partially relevant if it addresses only marginally the topic(s) of the call, or if only part of the proposal addresses them. Such conditions will be reflected in the evaluation of the first criterion ('S/T excellence'). The degree to which a proposal is relevant to the objectives of a call will be reflected in the evaluation of the third criterion ('impact'). Proposals that are clearly not relevant to a call ('out of scope') will be rejected on eligibility grounds before the evaluation.

3. For the funding scheme “**Support for Training and Career Development of Researchers**” the fourth column, and for the funding scheme “**Coordination and Support Actions**” the second column, corresponds to the **selection criteria** in the meaning of Article 115 of the Financial Regulation²³ and its implementing rules²⁴. They will also be the basis for assessing the “operational capacity” of participants. The other criteria correspond to the **award criteria**.

²³ Council Regulation No 1605/2002 of 25 June 2002 on the Financial Regulation applicable to the general budget of the European Communities, OJ L 248 16.09.2002, p.1.

²⁴ Commission Regulation No 2342/2002 of 23 December 2002 laying down detailed rules for the implementation of Council Regulation No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities, OJ L 357 31.12.2002, p. 1.

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

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

1.1 ITN - Funding Scheme “Support for Training and Career Development of Researchers”: Marie Curie Initial Training Networks				
S&T Quality (award) Threshold 3, Weighting:30%	Training (award) Threshold 4, Weighting:30%	Researcher (award) N/A	Implementation (selection) Threshold 3, Weighting:20%	Impact (award) Weighting:20%
S&T objectives of the research programme, including in terms of inter/multi-disciplinary, intersectoral and/ or newly emerging supra-disciplinary fields.	Quality of the training programme. Consistency with the research programme. Complementary skills offered: Management, Communication, IPR, Ethics, Grant writing, Commercial exploitation of results, Research Policy, entrepreneurship, etc.		Capacities (expertise / human resources/ facilities / infrastructures) to achieve the research, and adequate task distribution and schedule.	Contribution of the proposed training programme to improvement of the career prospects of the fellows.
Scientific quality of the research programme.	Importance and timeliness of the training needs (e.g. multidisciplinary, intersectoral, and newly emerging supra-disciplinary fields)		Appropriateness of industry involvement.	Provision to establish longer term collaborations and /or lasting structured training programme between the partners' organizations, including between private and academic partners.
Appropriateness of research methodology.	a) For multi-site proposals: Adequate combination of local specialist training with network-wide training activities. b) For mono-site proposals: Adequate exploitation of the international network of the participants for the training programme.		Adequate exploitation of complementarities and synergies among partners in terms of research and training.	Where appropriate, justification of the training events open to external participants and their integration in the training programme.
Originality and innovative aspect of the research programme. Knowledge of the state-of-the-art.	Appropriateness of the size of the requested training programme with respect to the capacity of the host		How essential is non-ICPC Third Country participation, if any, to the objectives of the research training programme.	Where appropriate, mutual recognition of the training acquired by multi-partner hosts.
			Appropriateness of the plans for the overall management of the training programme (demarcation of responsibilities, rules for decision making, recruitment strategy etc.).	Where applicable, relevance of the role of visiting researcher with respect to the training programme.
			Networking and dissemination of best practice among partners. Clarity of the plan for organizing training events (workshops, conferences, training courses).	

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

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

2.2 ERG Funding Scheme “Support for Training and Career Development of Researchers”: Marie Curie European Reintegration Grants

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

2.3 COFUND Funding Scheme “Support for Training and Career Development of Researchers”: Marie Curie Co-funding of Regional, National and International Programmes

Quality of the selection process for the fellows under the programme (award) Weighting:30%	Implementation - Management of the programme (selection) Weighting:30%	Relevance and Impact to “Life-long training and Career development” (award) Weighting:40%
Transparency of the selection process for the fellows under the programme	Appointment conditions of selected fellows	Openness of the programme to trans-national mobility
Composition and organisation of selection committees	Quality of programme management	Contribution to diverse career development of researchers (broadening or deepening)
Criteria and method of judging merit	Client-friendliness towards applicant researchers	Career development support to fellows
	Administrative capacity to implement the programme	Equal opportunities including for resuming a research career after a break
	Appropriateness of the scale of the programme	Relevance for the ERA of the scientific field covered by the programme's calls
	Future development of programme	Impact of the programme to the development of the researchers careers in the ERA

3.1 IAPP Funding Scheme “Support for Training and Career Development of Researchers”: Marie Curie Industry-Academia Partnerships and Pathways

S&T Quality (award) Threshold 3, Weighting:25%	Transfer of knowledge (award) Threshold 3, Weighting:20%	Researcher (award) N/A	Implementation (selection) Threshold 3, Weighting:25%	Impact (award) Weighting:30%
S&T objectives of the research programme, including in terms of intersectoral issues.	Quality of the transfer of knowledge programme. Consistency with the research programme.		Capacities (expertise / human resources/ facilities / infrastructures) to achieve the research and exchange of know-how and experience. Fit between capacity of host and size of support requested.	Provision to develop new intersectoral and lasting collaboration
Scientific quality of the joint collaborative research programme.	Importance of the transfer of knowledge in terms of intersectoral issues.		Adequate exploitation of complementarities and synergies among partners in terms of transfer of knowledge.	Strategy for the dissemination and facilitation of sharing of knowledge and culture between the participants and external researchers (including international conferences, workshops, training events).
Appropriateness of the research methodology.	Adequacy of the role of researchers exchanged and recruited from outside the partnership with respect to the transfer of knowledge programme.		Appropriateness of management plans (recruitment strategy, IPR strategy, demarcation of responsibilities, rules for decision making, etc...).	Extent to which SMEs contribute to the project.
Originality and innovative aspect of the research programme. Knowledge of the state-of-the-art.			How essential is non-ICPC Third Country participation, if any, to the objectives of the research training programme.	In case of SMEs participation: Adequacy of the available infrastructures for the performance of the project. In case extra equipment is requested, necessity and justification in the context of the partnership.

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

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

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

S&T Quality (award) Threshold 3, Weighting:25%	Transfer of knowledge (award) Weighting:15%	Researcher (award) Threshold 4, Weighting:25%	Implementation (selection) Weighting:15%, split where appropriate between the 3 rd country institution and the European host	Impact (award) Weighting:20%
Scientific/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal	Potential of transferring knowledge to European host and/or bringing knowledge to Europe	Research experience	Quality of infrastructure / facilities and International collaborations of host	Potential for creating long term collaborations and mutually beneficial co-operation between Europe and the third country
Research methodology	Clarity and quality of the transfer of knowledge objectives	Research results including patents, publications, teaching etc.	Practical arrangements for the implementation and management of the scientific project	Contribution to European excellence and European competitiveness
Originality and innovative nature of the project, and relationship to the 'state of the art' of research in the field		Independent thinking, leadership qualities, and capacity to transfer knowledge	Feasibility and credibility of the project, including work plan	Contribution to the socio-economic development of the Developing Countries or emerging and transition economies by transfer of knowledge and human capacity building (where relevant)
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	
Host scientific expertise in the field				
Quality of the group/researchers in charge				

4.3 IRG Funding Scheme “Support for Training and Career Development of Researchers”: Marie Curie International Reintegration Grants

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

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4.4 IRSES Funding scheme: “International Research Staff Exchange Scheme”.			
Quality of the Exchange Programme Weighting:25%	Transfer of Knowledge Threshold 3, Weighting:30%	Implementation Weighting:15%	Impact Threshold 3, Weighting:30%
Objective and relevance of the joint exchange programme	Quality and mutual benefit of the transfer of knowledge	Capacities (expertise/human resources/facilities/infrastructure) to achieve the objectives of the planned cooperation	Relevance of the proposed partnership to the area of collaboration and for the ERA
Scientific quality of the partners	Adequacy and role of staff exchanged with respect to the transfer of knowledge	Appropriateness of the plans for the overall management of the exchange programme	Potential to develop lasting collaboration with eligible Third country partners.
Complementarities/synergies between the partners			

Funding Scheme: "Coordination and Support Actions"		
Scientific and/or technological excellence (award) Threshold 3	Quality and efficiency of the implementation and the management (selection) Threshold 3	The potential impact through the development, dissemination and use of project results (award) Threshold 3
In case of Coordination action: Contribution to the co-ordination of high quality research	Quality of the consortium as a whole (including complementarity, balance) [for SA: only if relevant]	Appropriateness of measures for spreading excellence, exploiting results, and dissemination knowledge, through engagement with stakeholders, and the public at large.
In case of Coordination action: Quality and effectiveness of the co-ordination mechanisms, and associated work plan	Appropriateness of the allocation and justification of the resources to be committed (budget, staff, equipment)	
In case of Support action: Quality and effectiveness of the support action mechanisms, and associated work plan		

Annex 3: Community contribution and applicable rates

SUPPORT FOR TRAINING AND CAREER DEVELOPMENT OF RESEARCHERS

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

For each eligible researcher, the host organisation can opt between recruiting him/her under an employment contract/fellowship with full social security coverage or on a fixed-amount fellowship with minimum social security, depending on the legal and/or administrative situation of the host organisation and/or the researcher.

Column A. in Table 3.1 gives the amount per year in Euros per category of researchers who are recruited under an employment contract/fellowship with full social security coverage. These amounts include the provisions for all compulsory deductions under national applicable legislation.

Column B. in Table 3.1 gives the amount per year in Euros per category of researchers who receive a fixed-amount fellowship with minimum social security coverage. Fixed-amount fellowships with minimum social security coverage are not employment contracts. Researchers can only be recruited under a fixed-amount fellowship with minimum social security coverage if this is compatible with national legislation of the host organisation. The host organisation must ensure that minimum social security coverage has been provided to the researcher, not necessarily paid from the Community contribution for the fixed-amount fellowship. The minimum social security coverage required for researchers recruited under a fixed-amount fellowship shall include some of the categories foreseen in Council Regulation (EEC) No 1408/71 of 14 June 1971, which are namely: benefits in respect of accidents at work and occupational diseases and invalidity benefits.

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

As to maternity/parental benefits it has to be noted that, even if such a category does not fall within the minimum required social security coverage requested by the Commission, the Commission can decide, on request by the researchers and the host organisation, to augment the sum of the Community contribution as a consequence. This is the minimum standard of social security coverage required when a researcher is recruited under a fixed-amount fellowship, whether or not the country in which the project will be carried out has any regulations on this matter. Calculated on a monthly basis, the contribution shall not exceed the difference between the compensation received from the national social insurance regime and the amount of the Community contribution mentioned in Table 3.1.

Along with the monthly living allowance, a “mobility allowance” will be paid for some categories of researchers as specified in Table 3.4, which will take due account of the family situation of the researcher. In this context family is defined as persons linked to

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the researcher by (i) marriage, or (ii) a relationship with equivalent status to a marriage recognised by the national legislation of the country of the host organisation or of the nationality of the researcher; or (iii) dependant children who are actually being maintained by the researcher. This allocation, as well as the travel allowance, will only be due for researchers doing a trans-national mobility.

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

Table 3.1: Reference rates for monthly living allowances (cost of living index 100)²⁵

Researchers Categories	A (EUR/year)	B (EUR/year)
Early-stage researchers	34 500	17 250
Experienced researchers (4-10 years experience)	53 000	26 500
Experienced researchers (>10 years experience)	79 500	39 750

This amount represents an increase of roughly 1,9% of the 2007 Work programme, reflecting the average inflation in the EU during the intervening period as published by Eurostat.

Table 3.2. Travel allowances

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

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

²⁵ Rates for individual countries are obtained by applying to these rates the correction factors for cost of living, as referred in Table 3.3

Table 3.3 Correction Coefficients – The EU-25 Member States^{26, 27}

Austria	102,2
Belgium	100,0
Cyprus	99,0
Czech Republic	77,2
Denmark	133,5

Estonia	76,5
Finland	112,0
France	104,4
Germany	101,5
Greece	90,1

Hungary	66,5
Ireland	113,3
Italy	103,9
Latvia	71,1
Lithuania	71,2

Luxembourg	100
Malta	97,5
Netherlands	101,2
Poland	71,6
Portugal	91,4

Slovak Rep.	82,2
Slovenia	80,8
Spain	95,5
Sweden	108,9
UK	109,2

The non-EU Countries (and Romania and Bulgaria while in transition period for the calculation, and New Caledonia a French overseas territory)

Albania	82,7	Canada	90,6	Eritrea	49,4	Israel	109,6	Moldova	52,6	Rwanda	87,1	Thailand	60,3
Algeria	84,5	Cape Verde	77,4	Ethiopia	85,7	Jamaica	91,3	Morocco	86,8	Saudi Arabia	88,8	Togo	92,4
Angola	113,5	Gen African Rep.	120,1	Fiji	71,3	Japan (Naka)	113,7	Mozambique	69,3	Senegal	80,7	Trinidad & Tobago	70,4
Argentina	56,4	Chad	131,2	FYROM	69,7	Japan (Tokyo)	119,9	Namibia	72,8	Serbia	61,1	Tunisia	71,8
Armenia	105,7	Chile	76,6	Gabon	116,6	Jordan	72,3	Nepal	68,8	Sierra Leone	75,1	Turkey	83,7
Australia	99,1	China	76,7	Gambia	55,8	Kazakhstan	125,2	New Caledonia	134,5	Singapore	103,4	Uganda	55,5
Bangladesh	43,7	Colombia	63,2	Gaza Strip	92,7	Kenya	77,8	New Zealand	89,0	Solomon Islands	88,7	Ukraine	104,6
Barbados	125,7	Congo	130,4	Georgia	95,1	Kyrgyzstan	80,3	Nicaragua	60,7	South Africa	59,9	US	100,5
Benin	92,3	Costa Rica	69,1	Ghana	79,9	Laos	71,3	Niger	89,3	South Korea	112,4	Uruguay	72,9
Bolivia	48,4	Côte d'Ivoire	109,4	Guatemala	80,6	Lebanon	90,8	Nigeria	94,7	Sri Lanka	55,4	Vanuatu	114,5
Bosnia & Herzegovina	77,7	Croatia	105,8	Guinea	56,4	Lesotho	61,8	Norway	131,7	Sudan	52,1	Venezuela	60,9
Botswana	62,1	Cuba	97,1	Guinea-Bissau	100,7	Madagascar	72,3	Pakistan	52,2	Suriname	51,9	Vietnam	54,2
Brazil	76,2	Dem Rep Congo	132,4	Guyana	60,6	Malawi	70,4	Papua NewGuinea	75,6	Swaziland	62,6	West Bank	92,7
Bulgaria	76,4	Djibouti	96,8	Haiti	109,5	Malaysia	74,8	Paraguay	70,8	Switzerland	116,3	Yemen	68,2
Burkina Faso	89,7	Dominican Rep.	71,9	Honduras	74,9	Mali	91,2	Peru	78,4	Syria	65,5	Zambia	69,3
Cambodia	70,4	Ecuador	70,8	Hong Kong	101,3	Mauritania	67,7	Philippines	60,2	Taiwan	89,9	Zimbabwe	47,2
Cameroon	110,1	Egypt	51,0	India	45,3	Mauritius	70,7	Romania	62,7	Tajikistan	70,2		
		El Salvador	86,4	Indonesia	83,9	Mexico	70,2	Russia	120,7	Tanzania	58,8		

²⁶ For the EU-25 Member States based on the Council Regulation No 1895/2006 of 19 Dec 2006 (OJ L397, 30.12.2006) page 6, adjusting the weightings applicable to the remuneration of officials of the European Communities. For the other countries (and the most recent two EU Member States in transition) it is based on **Council Regulation (EC) No 453/2007 of 25 April 2007 laying down the weightings applicable from 1 July 2006 to the remuneration of officials of the European Communities**. Please note that the basis of the calculation of the two sets of coefficients differ in detail)

²⁷ For countries where the correction coefficient is not available (not indicated in the table, (e.g. Montenegro for which a survey is under way in the 2nd half of 2007), the Commission will decide on a **case by case** basis. For countries where there are multiple entries, but none of them exactly match the location of the fellowship, then the lowest coefficient for that country will be applied. For Iceland the rate of Norway apply

Table 3.4. Structure of the Community contribution (For COFUND and IRSES, financial details are given in the text)

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

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3.1 Action IAPP		Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
		- A - Monthly living and mobility allowance	- B - Travel Allowance	- C - Career exploratory allowance	- D - Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	- F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
Marie Curie Industry-Academia Partnerships and Pathways	For seconded staff members	<p>1- Monthly living allowance: fixed amount as specified in Table 3.1.</p> <p>2- Monthly mobility allowance: fixed amount to cover expenses linked to the relocation of the researcher and her/his family in the host country: reference rate of EUR 500 for researchers without a family and EUR 800 for researchers with family. The reference date for the family situation is the date recruitment of the researcher.</p>	Fixed amount as specified in Table 3.2.	<i>N/A</i>	<i>N/A</i>	Contribution to the host organisation for the execution of the partnership project/programme (publication of vacant positions, internal training actions), participation of eligible researchers in research and transfer of knowledge activities (research costs, participation meeting and conference attendance, etc) and contribution to the expenses related to the co-ordination between participants (partnership meetings, detachment of staff, etc): fixed amount of EUR 800 per researcher month	Contribution to the host institution for the organisation of international conferences, workshops and events open to participants outside the partnership, including: organisational expenses (invitation of keynote speakers, publications, rental of premises, web casting) and participation fees of eligible researchers from outside the partnership: fixed amount of EUR 300 per researcher-day for researchers from outside the partnership, for the duration of the event	Maximum 3 % of the total Community contribution	10 % of direct costs except for subcontractors and the costs of the resources made available by third parties which are not used in the premises of the beneficiary.	<p><u>For participating SMEs only:</u></p> <p>Small equipment expenses up to a maximum of 10% of the total contribution to the SME participant, if :</p> <ul style="list-style-type: none"> - duly justified for the project - on the basis of real costs - on prior agreement by the Commission
	For newly recruited researchers	The monthly living allowance and the monthly mobility allowance rates for individual countries are obtained by applying to these rates the correction factor for the cost of living as referred to in Table 3.3	Fixed amount of EUR 2 000 for each researcher with a stay of at least one year							

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2.1 Action IEF	Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
	- A - Monthly living and mobility allowance	- B - Travel Allowance	- C - Career exploratory allowance	- D- Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	-F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
Marie Curie Intra-European Fellowships for Career Development	<p>1- Monthly living allowance: fixed amount as specified in Table 3.1.</p> <p>2- Monthly mobility allowance: fixed amount to cover expenses linked to the relocation of the researcher and her/his family in the host country: reference rate of EUR 500 for researchers without a family and EUR 800 for researchers with family. The reference date for the family situation is the relevant deadline for submission of proposals.</p> <p>The monthly living allowance and the monthly mobility allowance rates for individual countries are obtained by applying to these rates the correction factor for the cost of living as referred to in Table 3.3.</p>	Fixed amount as specified in Table 3.2.	Fixed amount of EUR 2 000 for each researcher with a stay of at least one year	Contribution managed by the hosting organisations for expenses related to the participation of eligible researchers to research and training activities (meeting and conference attendance, participation in training actions, research costs, etc): fixed amount of EUR 500 per researcher-month for non-laboratory based research projects ; EUR 800 per researcher-month for laboratory based research projects	<u>N/A</u>	<u>N/A</u>	Maximum 3 % of the total Community contribution	10 % of direct costs except for subcontractors and the costs of the resources made available by third parties which are not used in the premises of the beneficiary.	<u>N/A</u>

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2.2/4.3 Action ERG – IRG ²⁸	Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
	- A - Monthly living and mobility allowance	B Travel Allowance	- C - Career exploratory allowance	- D - Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	- F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
2.2 Marie Curie European Reintegration Grants	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	Contribution managed by the hosting organisation for expenses related to the integration of the researcher in the host institution: fixed amount scheme (EUR <u>15 000</u>) per researcher/year during the period of reintegration up to a max. of 3 years.
4.3 Marie Curie International Reintegration	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	Contribution managed by the hosting organisation for expenses related to the integration of the researcher in the host institution: fixed amount scheme (EUR <u>25 000</u>) per researcher/year during the period of reintegration up to a max. of 4 years.

²⁸ In cases of durations that are not a multiple of 12 months, the contribution will consist of monthly fixed amounts calculated as a proportion of the yearly amounts.

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4.1 Action IOF	Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
	- A - Monthly living and mobility allowance	- B - Travel Allowance	- C - Career exploratory allowance	- D - Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	- F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
Marie Curie International Outgoing Fellowships for Career Development	<p>1- Monthly living allowance: fixed amount as specified in Table 3.1.</p> <p>2- Monthly mobility allowance: fixed amount to cover expenses linked to the relocation of the researcher and her/his family in the host country: reference rate of EUR 500 for researchers without a family and EUR 800 for researchers with family. The reference date for the family situation is the relevant deadline for submission of proposals.</p> <p>The monthly living allowance and the monthly mobility allowance rates for individual countries are obtained by applying to these rates the correction factor for the cost of living as referred to in Table 3.3</p> <p>Reintegration phase: the monthly mobility allowance is not applicable in the case of reintegration in the researcher's country of origin</p>	Fixed amount as specified in Table 3.2.	<u>N/A</u>	Contribution managed by the hosting organisations for expenses related to the participation of eligible researchers to research and training activities (meeting and conference attendance, participation in training actions, research costs, etc): fixed amount of EUR 500 per researcher-month for non-laboratory based research projects ; EUR 800 per researcher-month for laboratory based research projects	<u>N/A</u>	<u>N/A</u>	Maximum 3 % of the total Community contribution	10 % of direct costs except for subcontractors and the costs of the resources made available by third parties which are not used in the premises of the beneficiary.	<u>N/A</u>

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4.2 Action IIF		Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
		- A - Monthly living and mobility allowance	- B - Travel Allowance	- C - Career exploratory allowance	- D - Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	- F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
Marie Curie Incoming International Fellowships	Incoming phase	<p>1- Monthly living allowance: fixed amount as specified in Table 3.1.</p> <p>2- Monthly mobility allowance: fixed amount to cover expenses linked to the relocation of the researcher and her/his family in the host country: reference rate of EUR 500 for researchers without a family and EUR 800 for researchers with family. The reference date for the family situation is the relevant deadline for submission of proposals.</p> <p>The monthly living allowance and the monthly mobility allowance rates for individual countries are obtained by applying to these rates the correction factor for the cost of living as referred to in Table 3.3.</p>	Fixed amount as specified in Table 3.2.	<u>N/A</u>	Contribution managed by the hosting organisations for expenses related to the participation of eligible researchers to research and training activities (meeting and conference attendance, participation in training actions, research costs, etc): fixed amount of EUR 500 per researcher-month for non-laboratory based research projects ; EUR 800 per researcher-month for laboratory based research projects	<u>N/A</u>	<u>N/A</u>	Maximum 3 % of the total Community contribution	10 % of direct costs except for subcontractors and the costs of the resources made available by third parties which are not used in the premises of the beneficiary	<u>N/A</u>
	Possible return phase ²⁹	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	Contribution managed by the hosting organisation for expenses related to the integration of the researcher in the host institution: fixed amount scheme (EUR 15000). per researcher/year during the period of reintegration up to a max. of 1 year.

²⁹ In cases of durations that are not a multiple of 12 months, the contribution will consist of monthly fixed amounts calculated as a proportion of the yearly amounts.