

# ***THE PEOPLE Work Programme*** **2012**

***(European Commission C(2011)5033 of 19 July 2011)***

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

The WP is to be read in association with the relevant Guides for Applicants. The most current Guides and other documents are available on <http://ec.europa.eu/research/participants/portal/appmanager/participants/portal> and on CORDIS under [http://cordis.europa.eu/fp7/find-doc\\_en.html](http://cordis.europa.eu/fp7/find-doc_en.html)

**Part I** describes the background to the WP and the broad policy objectives. **Part II** gives details of the 2012 Actions, while **Part III** gives the corresponding information, in overview form, of the relevant calls. **Part IV** lists other activities not implemented through calls for proposals. **Part V** gives details of the 2012 budget distribution. The **Annexes** contain reference material.

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## Objective

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

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

The Marie Curie Actions are open to all domains of research and technological development addressed under the Treaty on the Functioning of the European Union. Research fields are chosen freely by the applicants. However projects that can be covered by the Euratom Treaty are excluded from funding.

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

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

<sup>1</sup> In accordance with Articles 179 to 190 of the Treaty on the Functioning of the European Union, and in particular Article 182(1) as contextualised in the following decisions: Decision No 1982/2006/EC of the European Parliament and of the Council of 18.12.2006 concerning the Seventh Framework Programme of the European Union for Research, Technological Development and Demonstration (2007-2013) and the Council Decision 2006/973/EC of 19.12.2006 adopting a Specific Programme for Research, Technological Development and Demonstration: 'People' (2007-2013).

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

## I CONTEXT

### General introduction and approach for 2012

The Commission's Europe 2020 Strategy<sup>3</sup> underlines that education, research and innovation are key drivers for competitiveness, jobs, sustainable growth and social progress. The People work programme 2012 has been designed to support the implementation of the Europe 2020 Flagship Initiatives 'Innovation Union', 'Youth On the Move' and 'An Agenda for new skills and jobs', and in particular to bring education, research and innovation closer to each other to attract, train and retain in Europe the next generation of researchers who will be able to address major societal challenges.

This work programme has been reinforced with a series of new initiatives to contribute to the objectives of these 3 Flagships. This has also been reflected in the description of the objectives and scope of the different calls for proposals, as well as in the expected impact statements. The evaluation criteria have been updated accordingly.

This work programme also fully supports the ERA-initiatives related to researchers as proposed by the Commission in 2008<sup>4</sup>, which seek to make Europe more attractive for researchers and to establish a balanced "brain circulation" within the EU as well as with third countries.

In this context the following specificities of the programme have been strengthened:

- Quality of researchers training:

European Industrial Doctorates are proposed as a new implementation mode under the Initial training of researchers Activity with the objective to train highly-skilled researchers and to stimulate entrepreneurship, creativity and innovation in Europe. This is achieved in particular by involving businesses in doctoral training so that skills better match public and private sector needs. This new development is also part of a wider effort of increasing the European quality of doctoral training, which is explored through the support of Innovative Doctoral Programmes under the same Activity.

- Gender balance in research careers:

The mobility rule for the Career Restart Panel in the Marie Curie IEF action has been made more flexible to better address maternity/parental leave situations.

For IEF, IOF and CIG actions, when evaluating the research experience of an applicant, any leave of absence in the research career of more than one year for reasons such as maternity/parental leave, sick or family care leave, military service, humanitarian aid work, will be taken into account by the evaluators.

- Attractive employment conditions:

Marie Curie Actions continue to act as trend setters by offering attractive working and employment conditions as well as competitive salaries to researchers, in particular through a system of adequate family and mobility allowances. This will continue to be promoted and the systematic reference to the European Charter for Researchers and Code of Conduct for their

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<sup>3</sup> "Europe 2020 – A European strategy for smart, sustainable and inclusive growth", (COM(2010)2020 of 3 March 2010), [http://ec.europa.eu/eu2020/index\\_en.htm](http://ec.europa.eu/eu2020/index_en.htm)

<sup>4</sup> "Better careers and more mobility: a European partnership for researchers" (COM(2008)317 final of 23 May 2008) and "A strategic Framework for EU International S&T cooperation" (COM(2008)588 final of 24 September 2008)

Recruitment<sup>5</sup> ('Charter & Code') in the evaluation criteria will support the implementation of the Innovation Union (IU).

- Leveraging national policies and programmes:

The objective of increasing impact through actions involving Member States research organisations, as stated in the Innovation Union, is addressed by the COFUND instrument. The potential of this action to generate additionality, both through numerical impact, measured by the number of new fellowship programmes created at national level as a result of COFUND, as well as through its structuring effect in terms of implementation of the 'Charter & Code', is well recognised. This is why this action has been reinforced with an increased budget following the high submission rate of the 2011 call.

- Knowledge sharing, dissemination and open access:

The communication of publicly funded research is a key issue for the dissemination of knowledge and for the public understanding of science and the role it plays in the lives of the European citizens and as a vehicle to achieve innovation.

This is why it is proposed that beneficiaries funded partially or entirely by the IEF, IIF, IOF and CIG Actions are encouraged to deposit peer-reviewed articles resulting from projects in an institutional or subject-based repository, and to make their best efforts to ensure open access to these articles within six months after their publication.

To further enhance dissemination, proposers in most of the Marie Curie Actions are also required to plan suitable outreach activities in each proposal. This plan is assessed during the evaluation process under the impact evaluation criteria and also during the project follow-up. In this context, and to further increase the impact of the Marie Curie Actions, the networking between Marie Curie fellows (current and past) will be enhanced through a new strategy of alumni services. These will range from creating a forum for contact and exchange between the fellows, providing possibilities for exploring collaborations and job opportunities, to the organisation of joint events and the involvement of the fellows in outreach activities as ambassadors for Marie Curie Actions and the ERA.

- International cooperation:

Most Marie Curie Actions are open to researchers from all nationalities and to participation by legal entities from third countries, which fully contribute to the Innovation Union objectives.

- Involvement of industry, including SMEs

Inter-sector mobility of researchers continues to be a priority. This issue is particularly addressed through the actions ITN and IAPP which can be seen as working models of the 'knowledge triangle' where education, research and innovation are brought together. Intersectoral co-operation is further reinforced in this work programme by involving industry in the training of doctoral candidates through the support of European Industrial Doctorates. A strong participation of SMEs is actively encouraged in this context.

- EURAXESS activities

New initiatives are launched to support the rapid implementation of the IU 'commitments' related to the removal of obstacles to mobility and cross-border co-operation. The 'Charter & Code' recommendation is a key instrument towards this aim. It provides a reference

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

framework for the roles, rights and responsibilities of researchers, their employers and funders. Continued support for policy implementation will be provided by the EURAXESS-Researchers in Motion initiative. New activities will be geared towards increasing the number of jobs and funding opportunities (including calls for fellowships at national and regional level) published on the EURAXESS (Jobs) Portal. Awareness of issues related to social security, taxation, visa and residency will be boosted by new activities carried out under EURAXESS Rights, with the active support by the EURAXESS Services Network. EURAXESS Rights will also be further developed to increase the impact of the 'Institutional Human Resources Strategy' on the growing number of participating institutions. EURAXESS Links will be further expanded to other regions of the world, beyond USA, Japan, China, India and Singapore. In collaboration with EURAXESS Links the EURAXESS Services Network will support efforts to facilitate contacts with the researchers' diaspora abroad.

EURAXESS will also contribute to the continued dialogue with the researcher community, for example concerning the Commission initiatives towards a 'European Framework for Research Careers' and principles for innovative doctoral training. Through its Services Network EURAXESS will continue to provide practical support for the transnational and international mobility of researchers.

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 for all actions and activities. From the date of adoption, it is the principal legal basis for calls for proposals and actions. It may also identify organisations which will receive support for specific actions.

In preparing this work programme, the Commission has taken into account advice from the 'People' Advisory Group<sup>6</sup>.

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

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

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

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

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

their personal details (name, given name if natural person, address, legal form and name and given name of the persons with powers of representation, decision-making or control, if legal person) may be registered in the EWS only or both in the EWS and CED, and communicated

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<sup>6</sup> [http://ec.europa.eu/research/fp7/index\\_en.cfm?pg=eag](http://ec.europa.eu/research/fp7/index_en.cfm?pg=eag)

to the persons and entities listed in the above-mentioned Decision and Regulation, in relation to the award or the execution of a procurement contract or a grant agreement or decision. More information on the EWS and CED can be found here:

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

### **Terms used in this work programme**

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

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

***Early-stage researchers*** must, at the time of recruitment (ITN) or secondment (IAPP, IRSES) by the host organisation, be in the first four years (full-time equivalent research experience) of their research careers and have not yet been awarded a doctoral degree.

***Experienced researchers*** must, at the time of the relevant deadline for submission of proposals (IEF, IIF, IOF, CIG) or recruitment (ITN, IAPP)/secondment (IAPP, IRSES) by the host organisation, be in possession of a doctoral degree or have at least four years of full-time equivalent research experience. In ITN, experienced researchers must also, at the time of recruitment by the host organisation, have less than five years of full-time equivalent research experience.

***Full-time equivalent research experience*** is measured from the date when a researcher obtained the degree which would formally entitle him or her to embark on a doctorate, either in the country in which the degree was obtained or in the country in which the researcher is recruited or seconded, irrespective of whether or not a doctorate is or was ever envisaged.

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

***Research organisations*** are defined in the FP7 Rules for Participation<sup>7</sup> as a "legal entity established as a non-profit organisation which carries out research or technological development as one of its main objectives".

***Other third countries*** are countries which are neither EU Member States nor third countries associated to FP7 (associated countries<sup>8</sup>).

<sup>7</sup> Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the Seventh Framework Programme and for the dissemination of research results (2007-2013) [Regulation (EC) No 1906/2006 of 18.12.2006, OJ L 391 of 30.12.2006, p.1] – hereafter 'FP7 Rules for Participation'.

<sup>8</sup> For a list of FP7 associated countries, see [ftp://ftp.cordis.europa.eu/pub/fp7/docs/third\\_country\\_agreements\\_en.pdf](ftp://ftp.cordis.europa.eu/pub/fp7/docs/third_country_agreements_en.pdf)

## **Implementation principles**

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

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

The actions will be implemented on the basis of open, quality-driven Europe-wide competition, with excellence of the project and participants, impact of the project and implementation capacity 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. Enhanced 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 business economic actors.

The international dimension is addressed by actions aiming to strengthen and enrich international cooperation through researchers and to attract research talent to Europe. Most of the Marie Curie Actions are open to [other third country](#) researchers. Also, depending on the action, the participation of legal entities from [other third countries](#) and of international organisations is foreseen under the conditions provided by the FP7 Rules for Participation (for details see each relevant action in part II). Moreover, the 4<sup>th</sup> Activity – the Marie Curie World Fellowships – is explicitly targeted at increasing the appeal for researchers to move to and from Europe. Beyond the individual fellowships, the International Research Staff Exchange Scheme (IRSES) provides the possibility to strengthen cooperation between European [research organisations](#) and [research organisations](#) of countries with which the EU has concluded Science and Technology agreements and European neighbourhood countries. Whereas the fellowship actions de facto favour applications to countries with an established research reputation, the IRSES action contributes to widening the geographical scope by giving an additional incentive for cooperation with certain International Cooperation Partnership Countries (ICPC).

The gender dimension is addressed in all Marie Curie actions. Indeed, the pursuit of knowledge and its translation towards society require the talent, perspectives and insight that can only be assured by increasing diversity in the research workforce. Therefore, the programme aims to ensure gender mainstreaming. The application of the principles of non-discrimination and equal opportunities are required in all Marie Curie Actions and gender participation is benchmarked with a view of achieving a broad balance over the period of the Framework Programme. The target of at least 40% participation by women at all levels set in earlier work programmes is maintained for 2012. In addition, in research projects where human beings are involved as subjects or end-users, gender differences may exist. In these cases the gender dimension in the research content has to be addressed as an integral part of the proposal to ensure the highest level of scientific quality.

The actions are designed to ensure that researchers can achieve an appropriate work/life balance and will support researchers wishing to resume their research career after a break. Although as a general rule fellowships are expected to be full-time, flexibility is provided for

instance in terms of splitting a fellowship into more than one stay, or through part-time working, if justified and appropriate in the frame of the project implementation.

In the implementation of the Marie Curie Actions, attention is also paid to the transparency of recruitment and selection processes practiced by projects and programmes funded, as well as to the working conditions and career development opportunities of the researchers employed or funded by them. For this the Commission Recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers<sup>9</sup> offers a reference framework, while being of a voluntary nature.

Proposals under actions 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. An individual researcher can submit only one proposal per calendar year to any of the individual actions IEF, IIF, IOF. In addition, they cannot benefit, at the same time, from more than one Marie Curie Action.

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

In case of submission of a proposal in the same field as a project for which the applicant/participant has already previously received European Union financing under the Seventh Framework Programme, other Union programmes or under previous Framework Programmes, the applicant has to demonstrate the substantial added value of the new project in relation to the project previously financed.

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

For Industry-Academia Partnerships and Pathways (IAPP), Intra-European Fellowships for Career Development (IEF), International Outgoing Fellowships for Career Development (IOF), International Incoming Fellowships (IIF) and Career Integration Grants (CIG), the distribution of the indicative budget of any given call over the evaluation panels<sup>10</sup> will be based on the number of eligible proposals received and allocated to these panels. The same mechanism will apply to the Initial Training Networks (ITN), except that a dedicated budget of 20 M€ will be allocated to the European Industrial Doctorates panel.

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 trans-national mobility' will be based on the requested European Union contribution of the proposals positively evaluated<sup>11</sup>. Given the specific nature of the action, and in particular the fact that most proposals are expected to be multi-disciplinary programmes, the two COFUND panels will be multi-disciplinary.

For all calls where proposals are allocated to panels, a ranked list will be established for each panel. If the budget allocated to one of the panels exceeds the requirements of all proposals positively evaluated in that panel, the excess budget will be transferred to other panels

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<sup>9</sup> Commission recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers, C(2005) 576 of 11.3.2005.

<sup>10</sup> The Marie Curie evaluation panels are: Chemistry (CHE), Social Sciences and Humanities (SOC), Economic Sciences (ECO), Information Science and Engineering (ENG), Environment and Geosciences (ENV), Life Sciences (LIF), Mathematics (MAT), Physics (PHY). In the ITN action an additional 9<sup>th</sup> panel has been created for the evaluation of the European Industrial Doctorates. In the IEF action there is also an additional 9<sup>th</sup> multidisciplinary career restart panel (CAR).

<sup>11</sup> i.e. proposals having passed all relevant evaluation thresholds.

following the above repartition mode. Equally, if the allocated funding to one panel is insufficient to fund the highest ranked proposal in that panel, necessary budget will be transferred from other panels in order to ensure that the highest ranked proposal can be funded.

For the International Research Staff Exchange Scheme (IRSES), the Researchers' Night (NIGHT), and the Trans-national collaboration among EURAXESS members on topics related to the innovation Union (EURAXESS-IU) proposals will be evaluated in a single multi-disciplinary panel and there will be a single ranked list for each of the actions.

In the case of the Researchers' Night (NIGHT), to ensure an adequate geographical coverage, funding decisions will be based on the panel ranked list in the following way: A shortlist of proposals consisting of the highest scoring positively evaluated proposal from each applicant country or international organisation will be produced. The initial funding decisions will be taken on this shortlist. After these decisions have been taken, if there is any remaining budget, subsequent funding decisions will be taken in the strict order of the panel ranked list.

The final budget awarded to each call, following the evaluation of projects, may vary by up to 10% from its indicative value.

#### **Modalities of implementation: The Research Executive Agency (REA)**

The activities in sections II, III (except Activity 5.2) under this work programme will be implemented by the Research Executive Agency according to the provisions of the Commission decision C/2008/3980 of 31/7/2008 "delegating powers to the Research Executive Agency with a view to performance of tasks linked to implementation of the Specific Community Programmes People, Capacities and Cooperation in the field of research comprising, in particular, implementation of appropriations entered in the Community budget". This equally applies to the activities in section IV 4.3, as far as they concern Actions implemented by REA.

## II CONTENT OF CALLS IN 2012

### Activity 1: Initial Training of Researchers

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

##### Call Reference FP7-PEOPLE-2012-ITN

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

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

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

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

The action will be primarily for researchers from Member States and associated countries, but also open to researchers from [other third countries](#).

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

**Partnership:** a distinction is made between partners in a network, based on their level of participation.

- Participants (level 1):

Participants are organisations (e.g. universities, public or private non-commercial research centres, large enterprises, SMEs, non-profit or charitable organisations, etc.) that are full partners of a network. They contribute directly to the implementation of the joint training programme of the network by recruiting, employing and supervising eligible researchers, by providing training in research and in transferable skills, as well as secondment opportunities. Full network partners are signatories to the grant agreement, receive funding and take complete responsibility for executing the proposed training programme.

- Associated partners (level 2):

Associated partners do not recruit any researchers, but provide training in research and transferable skills, as well as secondment opportunities. Associate partnership is open to both public and private sector organisations located in any country. Associated partners are not signatories to the grant agreement. However, each associated partner must include an up to date letter of commitment in the proposal to ensure their real and active participation in the network.

All partners (level 1 and level 2) participate in dedicated network activities as well as in the supervisory board.

**Private sector (including SMEs):** In order to ensure that researchers are trained in a suitably intersectoral environment to fully acquire the skills necessary for them to participate in a range of roles in the modern knowledge economy, the active involvement of the private sector in the research training programme is considered essential. This involvement is foreseen either at level 1 or at level 2. In all cases, the degree of involvement and commitment of the private sector will be assessed by the expert evaluators under each of the evaluation criteria.

#### **Type of networks:**

- **Multi-partner ITNs (ITN)**

ITNs are typically set up as multi-partner ITNs, with at least three participants (level 1) established in at least three different Member States or associated countries. Above this minimum, the participation of [\*other third countries\*](#) and of international organisations is possible under the conditions provided by the FP7 Rules for Participation. Participation of the private sector at level 1 is highly encouraged. Associated partners (level 2) can also complement the training programme.

On top of these multi-partner ITNs, two other implementation modes are also possible as described below:

- **European Industrial Doctorates (EID)**

They are composed of 2 participants at level 1, one academic institution and one participant from the private sector, established in two different Member States or associated countries.

The academic participant can be:

- an institution entitled to deliver doctoral degrees and recognised as such by the relevant authorities of the country concerned. In this case a research institution can be associated (level 2) to it for the purpose of the training.

or

- a research institution (level 1) associated with a university (level 2) that will deliver the degree.

Any additional associated partners (level 2) can also complement the training programme.

Each researcher must:

- be enrolled in a doctoral programme of the academic participant
- be employed by either both participants at level 1, or employed by one of them and seconded to the other for the share of the time foreseen under this action.
- spend at least 50% of his/her time in the participant from the private sector
- be jointly supervised by at least two supervisors, one from each participant.

In addition the consortium shall draw up a consortium agreement for their cooperation in the programme, which must at least cover the employment status of the candidate, IPR and the supervision arrangements, including qualifications of supervisors.

Applicants to these European Industrial Doctorates will be evaluated in a separate panel.

- **Innovative Doctoral Programmes (IDP)**

They are composed of a sole participant established in a Member State or associated country. They are typically universities or research institutions offering innovative doctoral programmes ensuring an international, interdisciplinary and intersectoral training. Collaborations with a wider set of associated partners (level 2), including from the private sector, as well as innovative elements of the proposed training addressing the needs of the Innovation Union flagship initiative, will be taken into account during the evaluations.

**Training Programme:** Participants 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 [early-stage researchers](#) and/or doctoral candidates.

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 key transferable skills common to all fields, e.g. in the field of entrepreneurship, management and financing of research projects and programmes, management of intellectual property rights, other exploitation methods of research results, ethical aspects, communication, standardisation and societal outreach.

Attention should be paid to the quality of the joint research training programme, with provision for qualitative and quantitative supervision and mentoring arrangements as well as career guidance, while ensuring, where relevant, the meaningful exposure of each researcher to other disciplines and sectors through visits, secondments and other training events. The training programme shall exploit complementary competences of the participant(s) and associated partners, including from the private sector, and should reflect, where relevant, 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 programme will have a clearly identified supervisory board co-ordinating network-wide training. The board will be composed of the network participant(s) and associated partners, and may also include any other stakeholders of relevance to the training programme. The board will ensure an adequate balance between scientific and technological training through personalised research projects and transferable skills training, appropriate to the needs of each recruited researcher. Involvement of the private sector in the supervisory board aims to ensure that the skills requirements for the researchers are defined on the basis of a thorough understanding of the sectoral needs of both academia and private sector to enhance the intersectoral employability of the researchers. The supervisory board will also establish active and continuous communication and exchange of best practice among the partners to maximise the benefits of the partnership.

Training events offered within the participant(s) and associated partners (summer schools, specialised training courses, seminars, etc) may also be opened to external researchers. Visiting researchers, originating from either the private or public sectors, can also be invited with a view to complement the network's capacity to transfer new knowledge.

The size of the joint training programme will depend on the nature and scope of the training activities to be undertaken by the participant(s) and associated partners, on the effective interaction among them, as well as on considerations regarding the management.

Each recruited researcher will establish, together with her/his personal supervisor(s), a Personal Career Development Plan. It will comprise his/her training and career needs (including transferable skills and meaningful exposure to the private sector, in particular through well-targeted secondments) as well as the scientific objectives and will later on report upon the success with which these objectives were met. In this way the researchers will be encouraged to play an active role in shaping their own training programme and professional development. Joint supervision of [early-stage researchers](#) is encouraged in ITNs and IDPs and mandatory in EIDs.

All the above elements will be assessed by the expert evaluators during the evaluation procedure.

**Eligible researchers:** This action supports the initial training of researchers.

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.

Within *multi-partner ITNs*, the initial training can also, to a limited extent, be directed to [experienced researchers](#) as long as they have less than five years of full-time equivalent research experience at the time of recruitment by the host organisation. They are encouraged to be recruited and trained in the private sector, with special attention being given to SMEs, in order to develop their management and entrepreneurial skills (organisation of the planning of secondments, setting-up collaboration with other institutions, coaching of ESRs, etc...). The support for [experienced researchers](#) will be limited to 24 months maximum within a network.

In all cases eligibility will be determined at the time of recruitment.

An individual researcher may not be recruited as an [early-stage researcher](#) and subsequently as an [experienced researcher](#) within the same network.

**Rules of mobility and nationality applicable to eligible researchers:** Researchers can be of any nationality. They must comply with the rule for [mobility](#) at the time of recruitment by the host organisation.

**European Union Contribution, Rates and Evaluation Criteria:** The European Union contribution and rates under this action are based on the Funding Scheme 'Support for training and career development of researchers', set out in Annex 3 of this work programme and shall be associated to:

- the recruitment of researchers to be trained;
- training and networking costs, organisation of joint activities and conferences.

In principle, the maximum duration of the programme to be supported will be four years from the date of commencement specified in the grant agreement.

The overall European Union contribution by grant agreement will be limited to the recruitment of maximum 500 researcher-months for ITN and IDP, and 180 researcher-months for EID.

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

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

Training programmes under this action are expected to contribute to the structuring of existing high-quality initial research and doctoral training capacity throughout Europe in both public and private sectors. By bringing complementary providers of research training from different countries, sectors and disciplines together, the programmes under this action are expected to enhance industry-academia cooperation in terms of skills development and knowledge-sharing and to deliver better overall quality of initial research and doctoral training in Europe. This will not only help to develop future generations of entrepreneurial 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 -2012-IEF*

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

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

The action may also assist researchers to resume a career in research after a break. To assure equal opportunities to all proposals, applicants for such proposals can apply to be evaluated in a separate multi-disciplinary panel. To qualify for evaluation in this 'career restart' panel, researchers must not have been active in research for at least 12 months immediately prior to the deadline for submission.

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

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

**Projects and participants:** This action provides financial support for advanced training and trans-national mobility, for a period of 12 to 24 months (full-time equivalent), for individual projects presented by [experienced researchers](#) active in Member States or associated countries in liaison with a host organisation from another Member State or associated country. Grant agreements for selected proposals are signed between the Research Executive Agency and the host organisation, that will then employ the researcher for the duration of the project.

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

Each researcher will establish, together with her/his personal supervisor in the host organisation, a Personal Career Development Plan comprising his/her training needs (including transferable skills) and research 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 and rules of mobility and nationality applicable to them:** [IEF Call Fiche](#).

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

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

Rather than merely providing employment opportunities for [experienced researchers](#), this action aims to catalyse significant development in researchers' careers, specifically by adding

different and/or complementary research competences at an advanced level, in the process of reaching and/or reinforcing a position of professional maturity or to permit them to resume a research career. Projects are therefore expected to add significantly to the career development of the best and most promising researchers active in Europe, in order to enhance and maximise their contribution to the knowledge-based economy and society.

## **2.2 MARIE CURIE ACTION: CAREER INTEGRATION GRANTS (CIG)**

### Call Reference FP7-PEOPLE-2012-CIG

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

The objective is to reinforce the European Research Area (ERA) by encouraging researchers to establish themselves in a Member State or in an associated country, thereby attracting and retaining the best talents in Europe. The action is designed to support researchers in the first steps of their European research career and to attain lasting professional integration in the ERA. By providing researchers with a substantial research budget, the action is intended to improve considerably their prospects for long term integration, thus contributing to the success of their research career.

This action should also allow the transfer of knowledge that the researchers have acquired prior to the Career Integration Grant, as well as to the development of lasting co-operation with the scientific and/or industrial environment of the country from which they have moved. This action has a particular emphasis on countering European 'brain drain' to [other third countries](#).

#### **2.2.2. Technical content/scope**

**Projects and participants:** This action consists of financial support for long term professional career integration projects in a host organisation of a Member State or associated country. The financial support aims to provide the researcher with the best possible conditions for establishing herself/himself in a long term research career.

For selected projects, a grant agreement is issued with the integration host organisation, which will commit itself to ensure an effective and lasting professional integration of the researcher for a period of at least the same duration as the project. The integration host organisation must provide the researcher with an employment contract with a remuneration package of at least the same level to that offered to equivalently qualified researchers at the same institution. 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.

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

**Eligible researchers and host organisations:** [CIG Call Fiche](#).

**European Union Contribution, Rates and Evaluation Criteria:** The grant can cover a period of up to 4 years. It corresponds to a flat rate contribution of 25 000 EUR per researcher and per year for the benefit of the recruited researcher, to contribute to his/her research costs at the career integration host. 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 the reinforcement of the human research potential in the European Research Area, by helping the integration of mobile researchers into a long term research position, as well as to improve substantially the research

potential of these researchers by allocating them a contribution to the research budget. Moreover, the action is beneficial in terms of knowledge transfer and trans-national cooperation. Indeed, the projects provide European organisations active in research in both the private and public sectors with opportunities to acquire new knowledge and experience gained by researchers during their mobility experience within or outside Europe. At the same time these researchers bring with them a network of beneficial international research collaborations.

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

*Call Reference FP7-PEOPLE-2012-COFUND*

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

This action aims at increasing the European-wide mobility possibilities for training and career development of *experienced researchers*, in line with the objectives set out in the activity heading 'Life-long training and career development', thus boosting its overall impact. The co-funding action targets programmes that support the trans-national mobility of *experienced researchers* at different stages of their careers, including researchers shortly after having obtained a doctorate, by broadening or deepening their individual competence, in particular in terms of acquisition of multi- or interdisciplinary skills or having intersectoral experiences and in particular encouraging mobility between public sector organisations and private companies; 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; 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 European Union actions, the co-funding action aims to encourage existing or new regional or national programmes to open up to and provide for trans-national mobility, as well as to reinforce international programmes.

The co-funding action targets a competitive selection of existing or new regional, national and international funding programmes that focus on the objectives set for this action, based on individual-driven mobility. These programmes must run an open, merit-based competition for the applying researchers, and be founded on international peer-review. While avoiding limitations regarding the researchers' origin and destination, they should also offer adequate working conditions for the fellows. These requirements should be in line with the principles set out in the European Charter for researchers and Code of conduct for the recruitment of researchers<sup>12</sup>. In particular, given their level of experience, the researchers funded under the programme are expected, as a general rule, to be offered employment contracts complying with the social security legislation applicable<sup>13</sup>. This also applies to programmes that provide a research grant to the fellows without covering their salaries. When an employment contract is not provided by the applicant programme, then this should be duly justified, and the longer-term perspectives for a change be presented. These elements will be assessed by the expert evaluators during the evaluation procedure.

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<sup>12</sup> Commission recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers, C(2005) 576 of 11.3.2005.

<sup>13</sup> See Council Regulation (EC) N° 883/2004 of 29 April 2004.

### 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 FP7 Rules for Participation, responsible for funding and managing fellowship programmes, e.g. ministries, state committees for research, research academies, councils or agencies;
- Other bodies, including *research organisations*, that finance and manage fellowship programmes either with an official mandate or recognised by public authorities, such as agencies established by governments under private law with a public service mission, charities, etc.;
- International organisations as defined in Article 2.10 and 11 of the FP7 Rules for Participation that run comparable actions 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 trans-national fellowship programmes (including national programmes opening for first time for trans-national mobility).
- Panel B) New fellowship programmes with trans-national mobility.

The proposal should demonstrate that the programme or programmes (to be) managed by the participant fund(s) individual research training/career development fellowships for the target group of *experienced researchers* addressed under the activity heading 'Life-long training and career development'. The programmes supported should have regular selection rounds for these category of researchers based on open, widely advertised competition, with transparent international peer review and selection of candidates on merits. The proposal should contain a clear plan on how the openness of the programme, the trans-national mobility and the working conditions of the final beneficiaries will be realised and/or enhanced. The European Union contribution for existing actions should not substitute or replace existing funding but contribute to an increased level of trans-national fellowships or the amelioration of working/employment conditions. These points 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** for fellowships/grants to residents of Member States or associated countries, preferably with a return phase;
- (2) **Incoming mobility** for fellowships/grants to non-residents of the country of the host organisation;
- (3) **Reintegration** of Member State or associated country nationals having carried out research in an *other third country* for at least 3 years, to establish them in a longer-term career after this trans-national mobility period.

The programmes to be cofunded under this action may be similar to IEF, IOF, IIF and CIG actions in this work programme.

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

Recruitment<sup>14</sup>. In establishing the mobility rules and during the selection process of researchers, the co-funded programmes must ensure that all selected researchers will demonstrate genuine mobility with a significant benefit for the European Research Area. These elements will be assessed by the expert evaluators during the evaluation procedure.

Selected programmes under the co-funding actions will be required to brand the eligible fellowships awarded “Co-funded by Marie Curie Actions”, and to advertise their calls and programmes internationally, including on the web-sites requested by the Commission (Euraxess Jobs web-site: <http://ec.europa.eu/euraxess/index.cfm/jobs/index>).

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

**European Union Contribution, Rates and Evaluation Criteria:** The European Union contribution is estimated based on 40% of the fellowship costs for eligible researchers, with a maximum overall of EUR 10 million to a single applicant entity<sup>15</sup> for one call.

In principle, selected programmes will be co-funded for a duration of 24 to 60 months.

This contribution will take the form of financing on the basis of a standard scale of unit cost. The scale of unit contribution consists of a flat rate per fellow-year, determined for each proposed fellowship action at the negotiation stage, based on evidence of the expected average costs, which will be confirmed by a separate Commission Decision. In establishing these contributions, a ceiling of 7% for management costs and 10% for overheads cannot be exceeded for any programme. The requested European Union contribution for each programme and fellowship type will be the flat-rate contribution multiplied by the number of fellowship-years.

Participants having benefited from COFUND under previous calls must explain in their proposals how the latest proposal relates to the earlier grant, and justify the new application in terms of 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 European Union 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

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

<sup>15</sup> However, in accordance with the Decisions concerning the Seventh Framework Programme (Decision No 1982/2006/EC of the European Parliament and of the Council of 18 December 2006) and the 'People' Specific Programme (Council Decision 2006/973/EC), the provisions of Article 120(2) of the Financial Regulation applicable to the general budget of the European Communities (Council Regulation (EC, Euratom) No 1605/2002, as last amended by Council Regulation (EC) No 1525/2007) and Article 184a of the Implementing Rules for the Financial Regulation (Commission Regulation (EC, Euratom) No 2342/2002 as last amended by Regulation (EC, Euratom) No 478/2007), 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.

focus on the objective set up for the “life-long training and career development”, based on individual-driven mobility. This impact is expected to extend to:

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

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

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

*Call Reference FP7-PEOPLE-2012-IAPP*

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

This action seeks to enhance industry-academia cooperation in terms of research training, career development and knowledge sharing, in particular with SMEs, and including traditional manufacturing industries. It is based on longer term cooperation programmes with a high potential for increasing mutual understanding of the different cultural settings and skill requirements of both the industrial and academic sectors. The IAPP action supports the 'Innovation Union' flagship initiative by strengthening research and business performance and by promoting innovation and knowledge transfer throughout the EU. Stronger cooperation between universities and business via staff exchange will encourage entrepreneurship and help to turn creative ideas into innovative products and processes that can efficiently address European and global societal challenges.

The action will be implemented through targeted and flexible support for human resources interactions within cooperation 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 one or more research organisations (e.g. universities/research centres) and one or more commercial enterprises, in particular SMEs, that propose a research project based on a joint cooperation programme. Within this action, the commercial partners must be research-performing 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. There must be at least one participant from each of the two sectors and from at least two different Member States or associated countries. Above this minimum, the participation of *[other third countries](#)* and of international organisations is possible under the conditions provided by the FP7 Rules for Participation. 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 in the form of a longer-term research 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 coordinated by either 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 cooperation 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 enabling these staff to attend events in a trans-national setting. All projects are expected to exchange staff. Typically this exchange is in both directions, but there is flexibility.
- Networking activities, organisation of workshops and conferences to facilitate sharing of knowledge and culture between the participants in a wider setting, involving the participants' own research staff and external researchers.
- Optional recruitment by the participants of [experienced researchers](#) from outside the partnership for involvement in transfer of knowledge and/or in the training of researchers;

Given the compulsory nature of secondments within the partnership and the optional nature of external recruitments, secondments will represent at least 50% of all human resources supported.

In principle, the maximum duration of the programme to be supported will be four years from the date of commencement specified in the grant agreement.

**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 one year (full-time equivalent) at that institution. The support granted to eligible researchers will be for periods of 2 to 24 months. 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](#). They will be recruited for a period of between 12 and 24 months.

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

Newly recruited researchers can be of any nationality. They must comply with the rule for [mobility](#) at the time of recruitment by the host organisation.

Seconded staff members must have been active in the seconding institute for at least 12 months prior to the secondment.

In the context of a collaboration established between more than two participants, a limited level of inter-sector mobility may be allowed between two participants in the same Member State 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.

**European Union Contribution, Rates and Evaluation Criteria:** European Union 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;
- For participating SMEs only: costs related to small equipment expenses up to a maximum of 10% of the total European Union contribution to the SME participant, if: (1) duly justified for the project, (2) on the basis of real cost and (3) after prior agreement by the Research Executive Agency.

The European Union rates are those for the Funding Scheme ‘Support for Training and Career Development of Researchers’, as set out in Annex 3 of this work programme. The evaluation, selection and award criteria are set out in Annex 2.

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

Research 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: World Fellowships**

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

*Call Reference FP7-PEOPLE-2012-IOF*

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

This action aims to reinforce the international dimension of the career of European researchers by giving them the opportunity to be trained and acquire new knowledge in a high-level organisation active in research, established in an [other third country](#) (outgoing phase). 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 provides financial support to individual mobility projects presented by [experienced researchers](#) in liaison with host organisations in the Member States or associated countries. The grant agreements will be concluded with the return host organisations of the Member States or associated countries for a total duration of up to 36 months.

The project is expected to include a coherent research programme for the total duration of the contract, of which an initial outgoing phase, of between one and two years, is to be spent in a distinct legal entity in an [other third country](#) (partner organisation) and a mandatory

re/integration phase of one year within the contracting organisation (return host organisation) in a Member State or an associated country. This element will be assessed by the expert evaluators during the evaluation procedure. 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 transferable skills) and research objectives and later report on the success with which these objectives were met. In this way the researchers will be encouraged to play an active role in shaping their own training programme and professional development.

The researchers shall be selected 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 outgoing phase of training in the partner organisation in the [other third country](#).

**Eligible researchers and rules of mobility and nationality applicable to them:** [Call Fiche IOF](#)

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

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

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

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

*Call Reference FP7-PEOPLE-2012-IIF*

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

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

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

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

**Projects and participants:** The action provides financial support to individual research projects presented by the incoming [experienced researchers](#) in liaison with a legal entity ('host organisation') in a Member State or an associated country, as well as possibly with a 'return host organisation' if the researcher was active in an International Cooperation Partner Country (see list of countries in Annex 1.1) before the incoming phase.

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

The researchers shall be selected on the basis of a proposal submitted in liaison with a host organisation in a Member State or associated country, as well as with a 'return host organisation' if appropriate.

##### *Incoming Phase:*

The grant agreement will be concluded with the host organisations of the Member States or the associated countries for a total duration of between 12 and 24 months.

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

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

The ranking list(s) for IIF proposals will be drawn up solely on the evaluation scoring of the incoming phase. During the evaluation, the evaluators will be asked to provide comments for the negotiation of the grant agreements with the return host, based on a description to be provided as part of the proposal. This will be taken into account by the Research Executive Agency for the finalisation of the grant agreement.

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

**Eligible researchers and rules of mobility and nationality applicable to them:** [IIF Call Fiche](#)

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

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

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

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

*Call Reference FP7-PEOPLE-2012-IRSES*

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

The Marie Curie International Research Staff Exchange Scheme is an action that aims to strengthen research partnerships through staff exchanges and networking activities between European [research organisations](#) and [research organisations](#) from countries with which the European Union has an S&T agreement or is in the process of negotiating one<sup>16</sup>, and countries covered by the European Neighbourhood policy<sup>17</sup>. Compared to individual Marie Curie Actions, that provide mobility possibilities to individual researchers, this action will provide support to [research organisations](#) to establish or reinforce long-term research cooperation through a coordinated joint programme of exchange of researchers for short periods.

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

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

A partnership in this action shall be composed of at least two independent participants established in at least two different Member States or associated countries, and one or more research organisations either located in countries with which the European Union has or is in the process of negotiating an S&T agreement, or in countries covered by the European Neighbourhood Policy<sup>17</sup>.

**Eligible programmes and eligible staff:** Participants will submit multi-annual proposals for joint programmes dedicated to exchanges of research staff. Technical and management staff may also participate in the exchanges.

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

The staff to be exchanged should guaranteed full reintegration and the positive recognition of the mobility experience, thus maximising the benefit of this action for long term cooperation.

The grant agreement will be concluded with the participants located in the Member States or associated countries, while the other members of the partnership will be defined in this agreement as 'partner organisations'.

**European Union Contribution, Rates and Evaluation Criteria:** The action is intended to provide an exchange of researchers between the European partners and the [other third country](#) partner organisations. From the financial point of view, the European Union's contribution will cover the mobility costs of European outgoing researchers, while the mobility costs of incoming researchers from other third countries are in principle covered by other funding.

The European Union contribution consists of a flat rate of 1900 EUR per exchanged staff member per month (or pro-rata for parts of months). The contribution is intended to cover the cost of travel and subsistence of the exchanged staff, as well as networking activities,

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<sup>16</sup> See ANNEX 1.2 to this work programme for the list of countries eligible for the IRSES action.

<sup>17</sup> And which are not associated countries for the purpose of FP7.

management costs and overheads directly related to the execution of the exchange. For countries located far from Europe (see list of eligible countries in Annex 1.3), an additional long distance allowance of 200 EUR per exchanged staff member per month is paid to contribute to their higher travel costs. However, if a partner organisation is located in one of the International Cooperation Partnership Country listed in Annex 1.2, a European Union contribution as described above will be provided for the mobility costs of the incoming researchers from these countries, if requested. This contribution will be administered by the Member State or associated country beneficiaries.

It is expected that the exchange in each direction from and to the European Research Area is balanced in terms of researcher months.

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

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

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

## **Activity 5: Specific Actions**

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

#### ***Call Reference FP7-PEOPLE-2012-NIGHT***

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

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

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

**Projects and participants:** The Researchers' NIGHT will take place on Friday 28<sup>th</sup> September 2012, and will be the next occasion for a European wide public and media event for the promotion of research careers. It is intended to ensure as large a geographical coverage as possible, involving the maximum number of Member States and associated countries. Participants can be any legal entity in the Member States and associated countries, and/or if relevant, constituting a partnership at regional, national or international level. Preference should be given to those projects within which a regional, local or national financial involvement exists (without excluding those requesting 100% funding). This will be evaluated by the expert evaluators under the 'Quality and efficiency of the Implementation and the management' evaluation criterion.

Activities organised will have to be focused on the public at large, and be organised with researchers being actively involved and directly in contact with the public. This will be evaluated by the expert evaluators under the 'The potential Impact through the development, dissemination and use of projects results' evaluation criterion.

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

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

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

## **5.2 TRANS-NATIONAL COLLABORATION AMONG EURAXESS MEMBERS ON TOPICS RELATED TO THE INNOVATION UNION (EURAXESS-IU)**

*Call Reference FP7-PEOPLE-2012-EURAXESS-IU*

### ***5.2.1. Introduction and objectives of the action***

This action will support activities by members of the EURAXESS Services Network addressing strategic issues related to the implementation of the Innovation Union<sup>18</sup>. Relevant Innovation Union Commitments to be addressed are:

#1 - training of a sufficient number of researchers to meet national R&D targets and promotion of attractive employment conditions in public research institutions;

#4 - removing obstacles to mobility and cross-border co-operation through a common approach including on the following topics<sup>19</sup>: quality of doctoral training, attractive employment conditions and gender balance in research careers, mobility across countries and sectors, open recruitment in public research institutions, comparable research career structures and the creation of European supplementary pension funds;

#30 - ensuring that leading academics, researchers and innovators reside and work in Europe and attracting a sufficient number of highly skilled third country nationals to stay in Europe.

Activities should be original and innovative. They should be focused on achieving concrete and clearly identified objectives. Projects should clearly valorise the different competences of the consortium partners; interaction with external stakeholders is desirable. They can foresee the use of external expertise in the fields related to the activity. All projects should have a verifiable impact on the capacity of the whole network to contribute to the implementation of the Innovation Union.

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<sup>18</sup> Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Europe 2020 Flagship Initiative - Innovation Union (COM (2010) 546 final of 6.10.2010)

<sup>19</sup> Innovation Union Commitment #4 covers a number of further topics; only those that are addressed by this call are reproduced here.

### ***5.2.2. Technical content/scope***

**Project and Participants:** Up to five proposals will be financed under this call. Only members of the EURAXESS Services Network (committed by the signature of the 'Declaration of Commitment') are eligible to participate in this call. Consortia have to include at least three independent legal entities from three different Member States or associated countries.

**European Union Contribution, Rates and Evaluation Criteria:** The grant(s) will cover a period of up to 24 months. The European Union contribution rates for this action are based on the 'Coordination and Support Actions (supporting)' funding scheme. The evaluation criteria are set out in Annex 2 of this work programme. Eligible costs will be those necessary for the implementation of the action.

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

The action will contribute to the objectives of the Innovation Union by delivering concrete and specific results that will help to make research careers in Europe more attractive, both for researchers who are already in Europe and are facing career decisions at one stage or another, and for those who are currently outside of Europe and might consider relocating to Europe to develop their research careers here.

The results from the projects funded are expected to go significantly beyond what can be achieved through the usual day-to-day activities of the participating EURAXESS Services Centres. By increasing the capacity of the whole EURAXESS Services Network in areas related to this call the impact of the action will be further enhanced.

### III IMPLEMENTATION OF CALLS

#### THE 2012 MARIE CURIE ACTIONS ROADMAP

(Listed by closing dates)

Action	Call ID	Call Opens	Call Deadline
NIGHT Researchers' Night	FP7-PEOPLE-2012-NIGHT	27 September 2011	10 January 2012
ITN Initial Training Networks	FP7-PEOPLE-2012-ITN	20 July 2011	12 January 2012
IRSES International Research Staff Exchange Scheme	FP7-PEOPLE-2012-IRSES	20 July 2011	18 January 2012
COFUND Co-funding of Regional, National & International Programmes	FP7-PEOPLE-2012 - COFUND	19 October 2011	15 February 2012
CIG Career Integration Grants 1st deadline	FP7-PEOPLE-2012-CIG	20 October 2011	06 March 2012
Trans-national Collaboration among EURAXESS members on topics related to the Innovation Union	FP7-PEOPLE-2012-EURAXESS-IU	18 January 2012	18 April 2012
IAPP Industry –Academia Partnerships and Pathways	FP7-PEOPLE-2012-IAPP	19 October 2011	19 April 2012
IEF Intra-European Fellowships	FP7-PEOPLE-2012-IEF	13 March 2012	16 August 2012
IIF International Incoming Fellowships	FP7-PEOPLE-2012-IIF	13 March 2012	16 August 2012
IOF International Outgoing Fellowship	FP7-PEOPLE- 2012-IOF	13 March 2012	16 August 2012
CIG Career Integration Grants 2nd deadline	FP7-PEOPLE-2012-CIG		18 September 2012

#### Activity 1: Initial Training of Researchers

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

- **Call identifier:** *FP7-PEOPLE-2012-ITN*
- **Date of publication:** 20 July 2011<sup>20</sup>
- **Deadline:** 12 January 2012 at 17.00.00, Brussels local time<sup>21</sup>
- **Indicative budget:** *EUR 423,23 million* of the 2012 budget<sup>22</sup>. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call. Of this amount *EUR 20 million* are earmarked for European Industrial Doctorates.
- **Topics called:**

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

<sup>20</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>21</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>22</sup> Under the condition that the draft budget for 2012 is adopted without modification by the budgetary authority.

- **Eligibility conditions:**

- The general eligibility criteria are set out in Annex 2 to this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
- Only information provided in Part A of the proposal will be used to determine whether the proposal is eligible with respect to the minimum number of eligible participants.

- **Additional eligibility criteria:**

- This action addresses joint research training programmes in the form of either multi-ITNs, European Industrial Doctorates (EID) or Innovative Doctoral Programmes (IDP). The number of participating legal entities required in this action is summarised in the table below.

Type	Conditions
Multi-partner ITN (ITN)	At least three participants established in at least three different Member States or associated countries. Above this minimum, the participation of <i>other third countries</i> and of international organisations is possible under the conditions provided by the FP7 Rules for Participation.
European Industrial Doctorates (EID)	Two participants, one academic institution and one participant from the private sector, established in two different Member States or associated countries.
Innovative Doctoral Programmes (IDP)	A sole participant with a network of associated partners. The sole participant shall be established in a Member State or in an associated country.

- **Evaluation procedure:**

- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding actions are set out in Annex 2 to this work programme.
- Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left and right) should be at least 15 mm (not including any footers or headers).
- Associated partners must include a letter of commitment in the proposal to ensure their real and active participation in the proposed network. The experts will be instructed to disregard the contribution of any associated partners for which no such evidence of commitment is submitted.
- A single-stage submission and evaluation procedure will be used.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.

- The procedure for prioritising proposals with equal scores is described in Annex 2 of this work programme.
- Proposals are allocated to one of the nine evaluation panels: eight Marie Curie evaluation panels<sup>23</sup>, and one 'European Industrial Doctorates' panel. For each panel a ranked list is established. The distribution of the indicative budget of the call over the research disciplines will be proportional to the number of eligible proposals received in each of the eight Marie Curie panels. For the 'European Industrial Doctorates' panel, an indicative budget of EUR 20 million is foreseen. If the budget allocated to any panel exceeds the requirements of all proposals positively evaluated<sup>24</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.
- **Indicative evaluation and contractual timetable:**
  - Evaluation results are estimated to be available within 4 months after the relevant deadline for submission.
  - Grant agreement signature: expected from within 9 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in EID resulting from this call are required to conclude a consortium agreement. Participants in ITN and IDP resulting from this call are NOT required to conclude a consortium agreement..
- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 to this work programme.

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

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

- **Call identifier:** *FP7-PEOPLE-2012-IEF*
- **Date of publication:** 13 March 2012<sup>25</sup>
- **Deadline:** 16 August 2012 at 17.00.00, Brussels local time<sup>26</sup>
- **Indicative budget:** *EUR 120 million* of the 2012 budget<sup>27</sup>. 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:**

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<sup>23</sup> The Marie Curie evaluation panels are: Chemistry (CHE), Social Sciences and Humanities (SOC), Economic Sciences (ECO), Information Science and Engineering (ENG), Environment and Geosciences (ENV), Life Sciences (LIF), Mathematics (MAT), Physics (PHY).

<sup>24</sup> Measured as proposals having passed all relevant evaluation thresholds.

<sup>25</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication

<sup>26</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>27</sup> Under the condition that the draft budget for 2012 is adopted without modification by the budgetary authority.

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

- **Eligibility conditions:**
  - The general eligibility criteria are set out in Annex 2 to this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
  
- **Additional eligibility criteria**
  - **Eligible researchers:** The action addresses [\*experienced researchers\*](#) who are at a stage of their career when they can benefit from a life-long training and career development measure. This includes researchers with a more senior profile in terms of experience as well as those who wish to resume their research career after a break. Researchers must be [\*experienced researchers\*](#) at the relevant deadline for submission of proposals.
  - **Rules of mobility and nationality applicable to eligible researchers:** Applicants can be of any nationality. They must demonstrate mobility from a Member State or an associated country to another Member State or associated country, and must comply with the rule for mobility at the deadline for submission of proposals. As an exception, for the 'career restart' panel, researchers will be eligible if they have not resided or carried out their main activity in the country of their host organisation for more than 3 years in the 5 years immediately prior to the relevant deadline for submission of proposals. The benefit of the proposed mobility will be assessed during evaluation in terms of benefit for the ERA.
  - The application is made jointly by a researcher and a host organisation. Applicant host organisations must be active in research and located in a Member State or in an associated country.
  - Projects must be for a period of 12 to 24 months (full-time equivalent).
  - For further details concerning these conditions you must refer to the core text of the work programme.
  
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding actions are set out in Annex 2 to this work programme.
  - Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
  - The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left and right) should be at least 15 mm (not including any footers or headers).
  - A single-stage submission and evaluation procedure will be used.
  - Proposals will not be evaluated anonymously.

- Proposals may be evaluated remotely.
  - The procedure for prioritising proposals with equal scores is described in Annex 2 of this work programme.
  - Proposals are allocated to one of the nine panels: the eight Marie Curie evaluation panels<sup>28</sup>, and one multi-disciplinary 'career restart' panel. For each panel a ranked list is established. The distribution of the indicative budget of the call over the panels will be proportional to the number of eligible proposals received in each panel. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated<sup>29</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.
- **Indicative evaluation and contractual timetable:**
    - Evaluation results are estimated to be available within 4 months after the relevant deadline for submission.
    - Grant agreement signature: expected from within 6 months after the relevant deadline for submission.
  - **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 to this work programme.
  - **Dissemination:** beneficiaries are encouraged to make their best efforts to ensure free access to peer-reviewed articles resulting from projects via an institutional or subject-based repository.

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**CALL TITLE: MARIE CURIE CAREER INTEGRATION GRANTS (CIG)**

- **Call identifier:** *FP7-PEOPLE-2012-CIG*
- **Date of publication:** 20 October 2011<sup>30</sup>
- **Deadline:** 6 March 2012 and 18 September 2012, at 17.00.00, Brussels local time<sup>31</sup>.
- **Indicative budget:** *EUR 40 million of the 2012 budget<sup>32</sup> (of which approximately 1/2 for each evaluation round following deadlines).* The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

<b>ACTION</b>	<b>Funding Schemes</b>
<i>Marie Curie Career Integration</i>	<i>Support for training and career development of</i>

<sup>28</sup> The Marie Curie evaluation panels are: Chemistry (CHE), Social Sciences and Humanities (SOC), Economic Sciences (ECO), Information Science and Engineering (ENG), Environment and Geosciences (ENV), Life Sciences (LIF), Mathematics (MAT), Physics (PHY).

<sup>29</sup> Measured as proposals having passed all relevant evaluation thresholds.

<sup>30</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>31</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>32</sup> Under the condition that the draft budget for 2012 is adopted without modification by the budgetary authority.

<i>Grants (CIG)</i>	<i>researchers</i>
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- **Eligibility conditions:**
  - The general eligibility criteria are set out in Annex 2 to this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
- **Additional eligibility criteria**
  - **Eligible researchers:** this action addresses researchers of any nationality who, at the relevant deadline for submission of proposals, correspond to the definition of [experienced researchers](#), and who comply with the [mobility](#) rule.  
A researcher who has benefited or is benefiting from a reintegration or career integration grant (including IRG and ERG grants under both FP6 and FP7) is ineligible for funding under this call.
  - The application is made jointly by a researcher and a host organisation.
  - **Applicant host organisations** must be active in research and located in a Member State or an associated country.
  - Projects must be for a period of up to 48 months (full-time equivalent).
  - For further details concerning these conditions you must refer to the core text of the work programme.
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding actions are set out in Annex 2 to this work programme.
  - Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
  - The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left and right) should be at least 15 mm (not including any footers or headers).
  - A single-stage submission and evaluation procedure will be used.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.
  - The procedure for prioritising proposals with equal scores is described in Annex 2 to this work programme.
  - Proposals are allocated to one of the eight evaluation panels<sup>33</sup>. For each panel a ranked list is established. The distribution of the indicative budget of the call over the research disciplines will be proportional to the number of eligible proposals received in each panel. If the budget allocated to a panel exceeds the

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<sup>33</sup> The Marie Curie evaluation panels are: Chemistry (CHE), Social Sciences and Humanities (SOC), Economic Sciences (ECO), Information Science and Engineering (ENG), Environment and Geosciences (ENV), Life Sciences (LIF), Mathematics (MAT), Physics (PHY).

requirements of all proposals positively evaluated<sup>34</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.

- **Indicative evaluation and contractual timetable:**
  - Evaluation results are estimated to be available within 4 months following the relevant deadline for submission.
  - Grant agreement signature: expected from within 6 months after the relevant deadline for submission.
- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in section II 2.2.2 of this work programme.
- **Dissemination:** beneficiaries are encouraged to make their best efforts to ensure free access to peer-reviewed articles resulting from projects via an institutional or subject-based repository.

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

- **Call identifier:** *FP7-PEOPLE-2012-COFUND*
- **Date of publication:** 19 October 2011<sup>35</sup>
- **Deadline:** 15 February 2012 at 17.00.00, Brussels local time<sup>36</sup>
- **Indicative budget:** *EUR 110 million* of the 2012 budget<sup>37</sup>. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

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

- **Eligibility conditions:**
  - The general eligibility criteria are set out in Annex 2 to this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
- **Additional eligibility criteria**
  - The application is made by a single organisation responsible for one or more fellowship programmes. Applicant organisations must be established in a

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<sup>34</sup> Measured as proposals having passed all relevant evaluation thresholds.

<sup>35</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>36</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>37</sup> Under the condition that the draft budget for 2012 is adopted without modification by the budgetary authority.

Member State or associated country and must fall into one of the following categories:

- Public bodies, as defined in Article 2.13 of the FP7 Rules for Participation<sup>38</sup>, responsible for funding and managing fellowship programmes, e.g. ministries, state committees for research, research academies, councils or agencies;
  - Other bodies, including [research organisations](#), that finance and manage fellowship programmes either with an official mandate or recognised by public authorities, such as agencies established by governments under private law with a public service mission, charities, etc.;
  - International organisations as defined in Article 2.10 and 11 of FP7 Rules for Participation that run comparable actions at European level as part of their mission.
- For further details concerning these conditions you must refer to the core text of the work programme.

- **Evaluation procedure:**

- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding actions are set out in Annex 2 to this work programme.
- Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left and right) should be at least 15 mm (not including any footers or headers).
- A single-stage submission and evaluation procedure will be used.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- The procedure for prioritising proposals with equal scores is described in Annex 2 to this work programme.
- Proposals are allocated to one of the two panels: (A) 'Existing trans-national fellowship programmes' and (B) 'New fellowship programmes with trans-national mobility'. The distribution of the indicative budget of the call between the two panels will be proportional to the requested European Union contribution of the proposals positively evaluated. For each panel a ranked list is established. If the budget allocated to one of the panels exceeds the

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<sup>38</sup> Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the Seventh Framework Programme and for the dissemination of research results (2007-2013) [Regulation (EC) No 1906/2006 of 18.12.2006, OJ L 391 of 30.12.2006, p.1].

requirements of all proposals positively evaluated<sup>39</sup> in that panel, the excess budget will be transferred to the other panel. Equally, if the allocated funding to one panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panel in order to ensure that the highest ranked proposal can be funded.

- **Indicative evaluation and contractual timetable:**
  - Evaluation results are estimated to be available within 4 months following the relevant deadline for submission.
  - Grant agreement signature: expected from within 9 months after the relevant deadline for submission.

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

#### CALL TITLE: MARIE CURIE INDUSTRY-ACADEMIA PARTNERSHIPS AND PATHWAYS (IAPP)

- **Call identifier:** *FP7-PEOPLE-2012-IAPP*
- **Date of publication:** 19 October 2011<sup>40</sup>
- **Deadline:** 19 April 2012 at 17.00.00, Brussels local time<sup>41</sup>
- **Indicative budget:** *EUR 80 million* of the 2012 budget<sup>42</sup>. The final budget awarded to this call, following the evaluation of projects, may however vary up to 10% of the total value of the call.
- **Topics called:**

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

- **Eligibility conditions:**
  - The general eligibility criteria are set out in Annex 2 to this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
- **Additional eligibility criteria**
  - This action addresses cooperation programmes between one or more research organisations (e.g. universities/research centres) and one or more commercial enterprises. There must be at least one participant from each of the two sectors and from at least two different Member States or associated countries. Above this minimum, the participation of *other third countries* and of international organisations is possible under the conditions provided by the FP7 Rules for Participation.
  - Within this action, the commercial partners must be research-performing companies gaining the majority of their revenue through competitive means

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<sup>39</sup> Measured as proposals having passed all relevant evaluation thresholds.

<sup>40</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>41</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>42</sup> Under the condition that the draft budget for 2012 is adopted without modification by the budgetary authority.

with exposure to commercial markets, and will include incubators, start-ups and spin-offs, venture capital companies, etc.

- For further details concerning these conditions you must refer to the core text of the work programme.
- Only information provided in Part A of the proposal will be used to determine whether the proposal is eligible with respect to the minimum number of eligible participants.

- **Evaluation procedure:**

- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding actions are set out in Annex 2 to this work programme.
- Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left and right) should be at least 15 mm (not including any footers or headers).
- A single-stage submission and evaluation procedure will be used.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- The procedure for prioritising proposals with equal scores is described in Annex 2 to this work programme.
- Proposals are allocated to one of the eight evaluation panels<sup>43</sup>. For each panel a ranked list is established. The distribution of the indicative budget of the call over the research disciplines will be proportional to the number of eligible proposals received in each panel. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated<sup>44</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.

- **Indicative evaluation and contractual timetable:**

- Evaluation results are estimated to be available within 4 months after the relevant deadline for submission.

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<sup>43</sup> The Marie Curie evaluation panels are: Chemistry (CHE), Social Sciences and Humanities (SOC), Economic Sciences (ECO), Information Science and Engineering (ENG), Environment and Geosciences (ENV), Life Sciences (LIF), Mathematics (MAT), Physics (PHY).

<sup>44</sup> Measured as proposals having passed all relevant evaluation thresholds.

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

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## Activity 4: World Fellowships

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

- **Call identifier:** *FP7-PEOPLE-2012-IOF*
- **Date of publication:** 13 March 2012<sup>45</sup>
- **Deadline:** 16 August 2012 at 17.00.00, Brussels local time<sup>46</sup>
- **Indicative budget:** *EUR 40 million* of the 2012 budget<sup>47</sup>. 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 International Outgoing Fellowships for Career Development</i>	<i>Support for training and career development of researchers</i>

- **Eligibility conditions:**
  - The general eligibility criteria are set out in Annex 2 to this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
- **Additional eligibility criteria**
  - **Eligible researchers:** The action addresses [experienced researchers](#) who are at a stage of their career when they can benefit from a life-long training and career development measure. This includes researchers with a more senior profile in terms of experience. Researchers must be [experienced researchers](#) at the relevant deadline for submission of proposals.
  - **Rules of mobility and nationality applicable to eligible researchers:** Researchers shall be considered eligible under this action if they are nationals of a Member State or associated country. However researchers from [other third countries](#) who have been residing and carrying out their main activity in Member States or associated countries for at least the 5 years prior to the submission deadline are also eligible for this action. For the outgoing phase, applicants must demonstrate mobility from a Member State or associated

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<sup>45</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>46</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>47</sup> Under the condition that the draft budget for 2012 is adopted without modification by the budgetary authority.

country to an [other third country](#), and must comply with the rule for [mobility](#) at the deadline for submission of proposals.

- The application is made jointly by a researcher and a return host organisation. The outgoing host organisation must be located in an [other third country](#), and the return host organisation in a Member State or associated country.
- Projects must be between 24 and 36 months full-time equivalent in total, of which the final 12 months must be a mandatory reintegration phase to the return host organisation.
- For further details concerning these conditions you must refer to the core text of the work programme.

- **Evaluation procedure:**

- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding actions are set out in Annex 2 to this work programme.
- Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left and right) should be at least 15 mm (not including any footers or headers).
- A single-stage submission and evaluation procedure will be used.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- The procedure for prioritising proposals with equal scores is described in Annex 2 to this work programme.
- Proposals are allocated to one of the eight evaluation panels<sup>48</sup>. For each panel a ranked list is established. The distribution of the indicative budget of the call over the research disciplines will be proportional to the number of eligible proposals received in each panel. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated<sup>49</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.

- **Indicative evaluation and contractual timetable:**

- Evaluation results are estimated to be available within 4 months after the relevant deadline for submission.

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<sup>48</sup> The Marie Curie evaluation panels are: Chemistry (CHE), Social Sciences and Humanities (SOC), Economic Sciences (ECO), Information Science and Engineering (ENG), Environment and Geosciences (ENV), Life Sciences (LIF), Mathematics (MAT), Physics (PHY).

<sup>49</sup> Measured as proposals having passed all relevant evaluation thresholds.

- Grant agreement signature: expected from within 6 months after the relevant deadline for submission.
- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 to this work programme.
- **Dissemination:** beneficiaries are encouraged to make their best efforts to ensure free access to peer-reviewed articles resulting from projects via an institutional or subject-based repository.

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

- **Call identifier:** *FP7-PEOPLE-2012-IIF*
- **Date of publication:** 13 March 2012<sup>50</sup>
- **Deadline:** 16 August 2012 at 17.00.00, Brussels local time<sup>51</sup>
- **Indicative budget:** *EUR 40 million* of the 2012 budget<sup>52</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

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

- **Eligibility conditions:**
  - The general eligibility criteria are set out in Annex 2 to this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
- **Additional eligibility criteria**
  - **Eligible researchers:** Researchers must be *experienced researchers* at the relevant deadline for submission of proposals. It is however expected that the researchers will typically have a more senior profile in terms of experience. This will be evaluated under the 'Researcher' evaluation criterion.
  - **Rules of mobility and nationality applicable to eligible researchers:** Applicants can be of any nationality. They must demonstrate mobility from an *other third country* to a Member State or associated country, and must comply with the rule for *mobility* with respect to the 'host organisation' at the deadline for submission of proposals. The benefit of the proposed mobility will also be assessed during evaluation in terms of benefit for the ERA.
  - The application is made jointly by a researcher and a host organisation, as well as, where applicable, a return host organisation. Applicant host organisations must be active in research. For the incoming phase, the host organisation must

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<sup>50</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>51</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>52</sup> Under the condition that the draft budget for 2012 is adopted without modification by the budgetary authority.

be located in a Member State or associated country. For a possible return phase, the return host organisation must be located in an International Cooperation Partner Country (ICPC).

- Projects must be for a period of between 12 and 24 months (full-time equivalent). Where relevant, the return phase will be for an additional 12 months.
- For further details concerning these conditions you must refer to the core text of the work programme.

- **Evaluation procedure:**

- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding actions are set out in Annex 2 to this work programme.
- Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left and right) should be at least 15 mm (not including any footers or headers).
- A single-stage submission and evaluation procedure will be used.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- The procedure for prioritising proposals with equal scores is described in Annex 2 of this work programme.
- Proposals are allocated to one of the eight evaluation panels<sup>53</sup>. For each panel a ranked list is established. The distribution of the indicative budget of the call over the research disciplines will be proportional to the number of eligible proposals received in each panel. If the budget allocated to a panel exceeds the requirements of all proposals positively evaluated<sup>54</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.

- **Indicative evaluation and contractual timetable:**

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

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<sup>53</sup> The Marie Curie evaluation panels are: Chemistry (CHE), Social Sciences and Humanities (SOC), Economic Sciences (ECO), Information Science and Engineering (ENG), Environment and Geosciences (ENV), Life Sciences (LIF), Mathematics (MAT), Physics (PHY).

<sup>54</sup> Measured as proposals having passed all relevant evaluation thresholds.

- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 to this work programme.
- **Dissemination:** beneficiaries are encouraged to make their best efforts to ensure free access to peer-reviewed articles resulting from projects via an institutional or subject-based repository.

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

- **Call identifier:** *FP7-PEOPLE-2012-IRSES*
- **Date of publication:** 20 July 2011<sup>55</sup>
- **Deadline:** 18 January 2012 at 17.00.00, Brussels local time<sup>56</sup>
- **Indicative budget:** *EUR 30 million* of the 2012 budget<sup>57</sup>. 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:**

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

- **Eligibility conditions:**
  - The general eligibility criteria are set out in Annex 2 to this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
- **Additional eligibility criteria**
  - This action addresses partnership composed of at least two independent "[\*research organisations\*](#)" established in at least two different Member States or associated countries, and one or more "[\*research organisations\*](#)" either located in countries with which the European Union has or is in the process of negotiating an S&T agreement, or in countries covered by the European Neighbourhood Policy<sup>58</sup>.
  - For further details concerning these conditions you must refer to the core text of the work programme.
  - Only information provided in Part A of the proposal will be used to determine whether the proposal is eligible with respect to the minimum number of eligible participants.

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<sup>55</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>56</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>57</sup> Under the condition that the draft budget for 2012 is adopted without modification by the budgetary authority.

<sup>58</sup> And which are not associated countries for the purpose of FP7.

- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding actions are set out in Annex 2 to this work programme.
  - Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
  - The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left and right) should be at least 15 mm (not including any footers or headers).
  - A single-stage submission and evaluation procedure will be used.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.
  - The procedure for prioritising proposals with equal scores is described in Annex 2 to this work programme.
  - Proposals will be evaluated in a single multi-disciplinary panel and there will be a single ranked list.
- **Indicative evaluation and contractual timetable:**
  - Evaluation results are estimated to be available within 4 months after the relevant deadline for submission.
  - Grant agreement signature: expected from within 9 months after the relevant deadline for submission.
- **Consortia agreements:** EU Member States and associated country participants in actions resulting from this call are NOT required to conclude a consortium agreement.
- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 to this work programme.

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## Activity 5: Specific Actions

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

- **Call identifier:** *FP7-PEOPLE-2012-NIGHT*
- **Date of publication:** 27 September 2011<sup>59</sup>
- **Deadline:** 10 January 2012 at 17.00.00, Brussels local time<sup>60</sup>
- **Indicative budget:** *EUR 4 million* of the 2012 budget<sup>61</sup>. 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.

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<sup>59</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>60</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>61</sup> Under the condition that the draft budget for 2012 is adopted without modification by the budgetary authority.

- **Topics called:**

<b>ACTION</b>	<b>Funding Schemes</b>
<i>Researchers' Night 2012</i>	<i>Coordination and Support Actions (supporting)</i>

- **Eligibility conditions:**

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

- **Evaluation procedure:**

- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding actions are set out in Annex 2 to this work programme.
- Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.
- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left and right) should be at least 15 mm (not including any footers or headers).
- A single-stage submission and evaluation procedure will be used.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- The procedure for prioritising proposals with equal scores is described in Annex 2 of this work programme.
- Proposals will be evaluated in a single multi-disciplinary panel and there will be a single ranked list.
- To ensure an adequate geographical coverage, funding decisions will be based on the panel ranked list in the following way: A shortlist of proposals consisting of the highest scoring proposal passing all thresholds from each applicant country will be produced. The initial funding decisions will be taken on this shortlist. After these decisions have been taken, if there is any remaining budget, subsequent funding decisions will be taken in the strict order of the panel ranked list.

- **Indicative evaluation and contractual timetable:**

- Evaluation results are estimated to be available within 1 month following the deadline for submission.
- Grant agreement signature: expected from within 4 months after the deadline for submission.

- **Consortia agreements:** Participants in actions resulting from this call are NOT required to conclude a consortium agreement.
- **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of this work programme.

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**CALL TITLE: TRANS-NATIONAL COLLABORATION AMONG EURAXESS MEMBERS ON TOPICS RELATED TO THE INNOVATION UNION (EURAXESS-IU)**

- **Call identifier:** *FP7-PEOPLE-2012-EURAXESS-IU*
- **Date of publication:** 18 January 2012<sup>62</sup>
- **Deadline:** 18 April 2012 at 17.00.00 Brussels local time<sup>63</sup>
- **Indicative budget:** *EUR 1 million* of the 2012 budget<sup>64</sup>. The final budget awarded to this call, following the evaluation of the projects, may vary up to 10% of the total value of this call.
- **Topics called:**

<b>ACTION</b>	<b>Funding Schemes</b>
<i>Trans-national collaboration among EURAXESS members on topics related to the Innovation Union</i>	<i>Coordination and Support Actions (supporting )</i>

- **Eligibility conditions:**
  - The general eligibility criteria are set out in Annex 2 to this work programme, and in the guide for applicants. Please note that the completeness criterion also includes that part B of the proposal shall be readable, accessible and printable.
- **Additional eligibility criteria**
  - Only members of the EURAXESS Services Network (committed by the signature of the 'Declaration of Commitment') are eligible to participate in this call.
  - Consortia have to include at least three independent legal entities from three different Member States or associated countries.
  - For further details concerning these conditions you must refer to the core text of the work programme.
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding actions are set out in Annex 2 to this work programme.
  - Proposal page limits: Applicants must ensure that proposals conform to the page limits and layout given in the Guide for Applicants, and in the proposal

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<sup>62</sup> The Director-General responsible for the call may publish it up to one month prior to or after the envisaged date of publication.

<sup>63</sup> The Director-General responsible may delay this deadline by up to two months.

<sup>64</sup> Under the condition that the draft budget for 2012 is adopted without modification by the budgetary authority.

part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits.

- The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left and right) should be at least 15 mm (not including any footers or headers).
  - A single-stage submission and evaluation procedure will be used following a single proposal submission.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.
  - The procedure for prioritising proposals with equal scores is described in Annex 2 to this work programme.
  - Proposals will be evaluated in a single multi-disciplinary panel and there will be a single ranked list.
- **Indicative evaluation and contractual timetable:**
    - Evaluation results are estimated to be available within 2 months following the deadline for submission.
    - Grant agreement signature: expected from within 6 months after the deadline for submission.
  - **Consortia agreements:** Participants in actions resulting from this call are NOT required to conclude a consortium agreement.
  - **Additional information:** The Commission will finance up to five proposals under this call. Grant agreements shall be awarded for up to 24 months.
  - **Forms of grants and maximum reimbursement rates:** The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 to this work programme.

#### IV OTHER ACTIONS FOR 2012

Activities described in this chapter are not implemented through calls for proposals.

The different initiatives, which aim to respond to the objective of reinforcing human resources in research and innovation in Europe and to stimulate a culture of mobility and career development, collectively contribute to achieving the objectives of the Europe 2020 Strategy and its Innovation Union flagship initiative. 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 specific contracts or grant agreements<sup>65</sup>, or via experts' contracts. The implementation method to be used is given in the description for each of the topics below. The essential selection and award criteria are contained in Annex 2, while the upper funding limits are in accordance with those set out in Article 33 of the FP7 Rules for Participation (Annex 3).

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<sup>65</sup> Based on 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 Participation.

## **4.1 SUPPORT FOR EURAXESS-RESEARCHERS IN MOTION ACTIVITIES**

### Objectives

To contribute to the development of the European Research Area and thus an open and attractive labour market for researchers, EURAXESS-Researchers in Motion shall provide support to researchers experiencing mobility across countries and sectors seeking to advance their careers and professional development by being mobile.

More specifically, to support the follow-up of the Innovation Union Communication<sup>66</sup> with a special focus on Commitments #1, #4, and #30<sup>67</sup>, EURAXESS-Researchers in Motion will initiate and contribute to activities aimed at making European research careers more attractive to researchers from anywhere in the world and at removing obstacles to researcher mobility. Activities will in particular include the promotion of open recruitment in public research institutions, of gender balance in research careers, of comparable research career structures and of agreed principles for innovative doctoral training.

This implies the following operational objectives:

- To maintain the quality and visibility level of the EURAXESS Services Network (including specifically for non-European researchers) and to further expand its geographic coverage; to further raise awareness of all EURAXESS activities (Jobs, Services, Rights and Links).
- To further extend the range of activities covered by EURAXESS Rights by adding ongoing and new policy initiatives to its scope.
- To expand the capacity and user-friendliness of the EURAXESS (Jobs) Portal and to ensure its effective links both with the national EURAXESS portals complementing it, and with other relevant job platforms.
- To further promote the existing network of European researchers abroad (EURAXESS Links) whilst extending its services to non-European researchers and expanding it geographically to other countries and regions in the world. The aim is to provide European researchers abroad with information on European research policies and activities and to keep them up-to-date on the developments in this area, while at the same time catalysing scientific collaboration with the host countries.
- To evaluate the level of awareness of EURAXESS (in particular regarding the EURAXESS (Jobs) Portal and the EURAXESS Services Network).
- To evaluate the effectiveness and impact of EURAXESS Links.

### Implementation

Activities will include EURAXESS Services, Rights, Links and cross cutting activities, maintenance and development activities of the EURAXESS (Jobs) Portal, and an evaluation study.

### Expected impact

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<sup>66</sup> Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Europe 2020 Flagship Initiative - Innovation Union (COM (2010) 546 final of 6.10.2010)

<sup>67</sup> These Commitments address in particular: #1 - training of sufficient numbers of researchers and promoting attractive employment conditions; #4 - quality of doctoral training, attractive employment conditions and gender balance, mobility across countries and sectors, open recruitment, comparable research career structures, supplementary pensions; #30 - attracting to and retaining in Europe leading academics, researchers and innovators.

All the actions will contribute to raising the attractiveness of the research profession in Europe for both European and non-European researchers in line with the Innovation Union Flagship Commitments #1, #4 and #30.

#### **4.1.1. EURAXESS Services, Rights, Links and cross cutting activities:**

- In order to include the Faroe Islands<sup>68</sup> in the EURAXESS Services Network, a grant of duration of up to 3 years may be awarded to an identified beneficiary in the sense of the Rules for Participation in the Seventh Framework Programme<sup>69</sup>, namely the Faroese Research Council (Granskingarráðið, Bryggjubakki 12, P.O. 259, FO-110 Tórshavn, Faroe Islands). The EU contribution of EUR 200 000 will serve to contribute to the start-up phase of the organisation and operation of the Faroese EURAXESS Services Network.

Indicative budget: EUR 200 000<sup>70</sup>

Funding scheme: Coordination and Support action - grant to a named beneficiary

Amounting to an indicative total of EUR 2 300 000<sup>70</sup>, the following activities will be implemented:

- EURAXESS Services and EURAXESS cross-cutting activities implemented under framework contracts for projects of one year duration. The activities will include: promotion activities with special emphasis on EURAXESS Services and EURAXESS Rights, animation activities related to EURAXESS, e.g. workshops and training sessions. This activity will be implemented under framework contracts with specific contracts of one year duration.

Funding scheme: Coordination and Support Action - public procurement, maximum four specific contracts. Procedures normally to be conducted in the first half of 2012.

- EURAXESS Rights activities related to Innovation Union Commitments #1, #4, and #30. These will in particular include activities to support the implementation of the 'Human Resources Strategy for Researchers incorporating the Charter and Code' by employers and funders of researchers from across Europe. They may equally include activities related to EU policy initiatives such as the 'European Framework for Research Careers' or the promotion of best-practice based principles for innovative doctoral training. Further areas where activities may be proposed include social security for mobile researchers and entry conditions for researchers from Third Countries. The activities will in particular include: mutual learning seminars and focus groups. This activity will be implemented under framework contracts with specific contracts of one year duration.

Funding scheme: Coordination and Support Action - public procurement, maximum eight specific contracts. Procedures normally to be conducted in both the first and second half of 2012.

- Preparation of the biennial EURAXESS Conference 2013; around 250 participants. To ensure full ownership of EURAXESS at local and national level, the conference is organised each time in a different EURAXESS member country. This activity will be implemented under framework contracts with specific contracts of one year duration.

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<sup>68</sup> FP7 Association Agreement signed on 3 June 2010.

<sup>69</sup> Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, Article 14 (a)].

<sup>70</sup> Under the condition that the preliminary draft budget for 2012 is adopted without modification by the budget authority.

The biennial conference is the key networking instrument for the EURAXESS Services Network, bringing together most of the Services Centres from across Europe. It provides a unique opportunity to engage the whole network in the policy dialogue on issues of strategic importance for reaching the objectives of the Innovation Union. An immediate impact of the conference will be the strengthening of the network's activities at local, national and European level through networking and the development of joint strategic goals to be achieved.

*Funding scheme:* Coordination and Support Action - public procurement, maximum three specific contracts. Procedures normally to be conducted in the first half of 2012.

- Preparation of a first EURAXESS Links Global Conference in 2012; around 150 participants.

This conference will consolidate the unique role of the EURAXESS Links network as a global forum for European researchers abroad. By supporting the direct interaction between EU policy makers and the European researcher Diaspora, it recognises the latter as a key stakeholder in the formulation of European research policies.

The conference will provide a platform for active networking and for the exchange of experiences and best practices between and among EURAXESS Links members and EURAXESS Links information officers. Already existing and new collaboration between EURAXESS Links and other Diaspora networks of researchers from Member States and associated countries will be enhanced by inviting representatives of such networks to the conference. The event will provide a framework to learn from their rich experience while reaching out to a larger number of potential EURAXESS Links members. This activity will be implemented under framework contracts with specific contracts of one year duration.

*Funding scheme:* Coordination and Support Action – public procurement, maximum three specific contracts. Procedures normally to be conducted in the first half of 2012.

#### **4.1.2. EURAXESS (Jobs) Portal:**

Activities to increase the capacity and ease of use of the EURAXESS (Jobs) Portal through technical maintenance, further architectural developments as well as graphical and functional enhancements. These activities will be implemented with a view to further strengthening and fine-tuning the infrastructure set up to accommodate the global advertisement of all research vacancies in Europe (also using profiles identified within the 'European Framework for Research Careers') and to further expanding the portal's data-base architecture and capacity to include researchers' mobility patterns. Activities also include services by an external information system (IS) provider who, on the basis of inputs provided by the responsible Commission services, guarantees the smooth running of the EURAXESS Portal. This includes the IS service management, provision of user information, coordination between the project team on Commission side and the service team on the side of the contractor in charge of the technical maintenance, management of information sites, organisation and management of IS training, as well as promotion of information systems. This activity will be implemented under framework contracts with specific contracts of one year duration.

Indicative budget EUR 600 000<sup>71</sup>

*Funding scheme:* Coordination and Support Action – public procurement, up to two specific contracts. Procedures normally to be conducted in the first half of 2012.

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<sup>71</sup> Under the condition that the preliminary draft budget for 2012 is adopted without modification by the budget authority.

#### **4.1.3. EURAXESS evaluation study:**

In the context of the Communication "Better Careers and More Mobility – A European Partnership for Researchers"<sup>72</sup> and the 'Innovation Union Commitments', a EURAXESS evaluation study is foreseen, to be implemented under a framework contract with specific contracts of one year duration. This study will combine two aspects: an assessment of the overall progress achieved after the re-branding and regrouping of EURAXESS activities in 2008 (with a focus on the EURAXESS Services Network), and an evaluation of the impact of the functioning of EURAXESS Links in the US, Japan, and China on the networking of European researchers.

Indicative budget EUR 300 000<sup>73</sup>

*Funding Scheme:* Coordination and Support Action - public procurement. One specific contract. Procedures normally to be conducted in the first half of 2012.

#### **4.2 FP7 MARIE CURIE ACTIONS STUDIES**

##### *Objective*

To study aspects of high relevance for the successful implementation of the Marie Curie Actions (synergies with other EU programmes, interdisciplinarity, skills and employability of researchers) and to prepare more adequately the next generation of programmes.

##### *Implementation*

The studies will be implemented through the launch of calls for tenders.

The studies will be executed in 2012-2013 and will help preparing future actions beyond FP7.

##### *Expected impact:*

In the short term, analysis of the employability of researchers, interdisciplinarity and possible synergies with other programmes will help designing and improving pertinent measures in the Marie Curie Actions beyond 2013. Longer term impacts include equipping researchers with adequate skills to match tomorrow's labour market, creating more links between research disciplines which will contribute to the research results and innovation.

Indicative budget EUR 400 000<sup>73</sup>

*Funding Scheme:* Coordination and Support Action - public procurement, up to three specific contracts.

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

##### *Objective*

Support for an EU presidency event with the objective to take stock of the European research training potential, and the importance of international, interdisciplinary and cross-sectoral cooperation in this respect, for which Cyprus has informally indicated an interest as part of their early planning for the EU presidency for the second half of 2012.

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<sup>72</sup> Communication from the European Commission to the Council and the European Parliament on "Better Careers and More Mobility - A European Partnership for Researchers" (COM(2008) 317 final)

<sup>73</sup> Under the condition that the preliminary draft budget for 2012 is adopted without modification by the budget authority.

### *Implementation*

On the condition that the incoming Cyprus Presidency confirms their intentions, this would be implemented through a grant agreement for a single project to the appropriate authorities from the Republic of Cyprus (University of Cyprus, Kallipoleos Street 75, CY-1678 Nicosia, Cyprus) that will cooperate with other institutions of the country for the organisation of the event. Procedures normally to be conducted in the first half of 2012.

### *Expected Impact*

**The main objective of the conference is to provide a suitable forum for discussing the European research training potential: how to increase its attractiveness and excellence while addressing the needs of tomorrow. This will be addressed from different perspectives while highlighting challenges and best practices. This conference will also encourage young people to embark on scientific careers.**

Indicative budget EUR 150 000<sup>74</sup>

Funding Scheme: Coordination and Support action - grant to a named beneficiary

## **4.4 ALUMNI SERVICES**

### *Objectives*

To further increase the impact of the Marie Curie actions, the networking between Marie Curie fellows (current and past) will be enhanced. through the implementation of alumni services. An other objective will be to maintain a permanent contact with Marie Curie Researchers in order to evaluate the impact of Marie Curie Actions on their further career development.

### *Implementation*

Alumni services will be proposed, ranging from creating a forum for contact and exchange between the fellows, providing possibilities for exploring collaborations and job opportunities, to the organisation of joint events and the involvement of the researchers in outreach activities as ambassadors for Marie Curie actions and the ERA.

Indicative budget EUR 700 000<sup>74</sup>

Funding Scheme: Coordination and Support Action - public procurement

## **4.5 APPOINTMENT OF INDEPENDENT EXPERTS**

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

Indicative budget EUR 11 000 000<sup>74</sup>

Funding Scheme: Coordination and Support Action – experts<sup>75</sup>.

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<sup>74</sup> Under the condition that the preliminary draft budget for 2012 is adopted without modification by the budget authority.

<sup>75</sup> In accordance with Articles 14, 17 and 27 of the FP7 Rules of Participation.

## V BUDGET

### SUMMARY – 2012 BUDGET

Actions subject to calls for proposals	Budget 2012 <sup>76</sup> (EUR million)
<b>1. Initial Training of Researchers</b>	
Initial Training Networks (ITN)	423.23
<b>2. Life-long Training and Career Development</b>	
Intra-European Fellowships for Career Development (IEF)	120.00
Career Integration Grants (CIG)	40.00
Co-funding of Regional, National, and International Programmes (COFUND)	110.00
<b>3. Industry-Academia Partnerships and Pathways</b>	
Industry-Academia Partnerships and Pathways (IAPP)	80.00
<b>4. World Fellowships</b>	
International Outgoing Fellowships for Career Development (IOF)	40.00
International Incoming Fellowships (IIF)	40.00
International Research Staff Exchange Scheme (IRSES)	30.00
<b>5. Specific Actions</b>	
Researchers' Night (NIGHT)	4.00
Trans-national collaboration among EURAXESS members on topics related to the innovation Union (EURAXESS-IU)	1.00
<b>Subtotal</b>	888.23
<b>Policy Actions not subject to open calls for proposals</b>	4.65
<b>Expert Evaluators and Reviewers</b>	11.00
<b>Total</b>	<b>903.88</b>

Actions not subject to open calls for proposals	Budget 2012 <sup>76</sup> (EUR million)
Support for EURAXESS-Researchers in motion	3.4
FP7 Marie Curie Actions Studies	0.4
Support for an EU Presidency event	0.15
Alumni services	0.70
<b>Total</b>	<b>4.65</b>

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

- by up to 10% of the total value of the indicated budget for each call; and

<sup>76</sup> Under the condition that the preliminary draft budget for 2012 is adopted without modification by the budget authority.

- 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.

## **VI INDICATIVE PRIORITIES FOR 2013 ONWARDS**

In principle, 2013 will see a continuation of the main Marie Curie Actions of 2012.

In 2013, the planned budget increase of the 'People' Specific Programme will allow increased flexibility of its actions, in particular to fully contribute to the European Partnership for Researchers.

## ANNEXES

### Annex 1.1 International Cooperation Partner Countries (ICPC)

#### List of International Co-operation Partner Countries (ICPC)<sup>77</sup>

#### 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 Africa <sup>78</sup>	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	UM
• 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 <sup>78, 82**</sup>	LM
• Democratic People's Republic of Korea	L
• India <sup>78**</sup>	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)

• Armenia <sup>79</sup>	LM
• Azerbaijan <sup>79</sup>	LM
• Belarus <sup>79</sup>	LM
• Georgia <sup>79</sup>	LM
• Kazakhstan	LM
• Kyrgyz Republic	L
• Moldova <sup>79, 81</sup>	LM
• Russia <sup>78,**</sup>	UM
• Tajikistan	L
• Turkmenistan	LM
• Ukraine <sup>78, 79, 81</sup>	LM
• Uzbekistan	L

#### LATIN AMERICA

• Argentina <sup>78</sup>	UM
• Bolivia	LM
• Brazil <sup>78,**</sup>	LM
• Chile <sup>78</sup>	UM
• Colombia	LM
• Costa Rica	UM
• Ecuador	LM
• El Salvador	LM
• Guatemala	LM
• Honduras	LM
• Mexico <sup>78</sup>	UM
• Nicaragua	LM
• Panama	UM
• Paraguay	LM
• Peru	LM
• Uruguay	UM
• Venezuela	UM

#### MEDITERRANEAN

#### PARTNER

#### COUNTRIES (MPC)

• Algeria <sup>79</sup>	LM
• Egypt <sup>78, 79</sup>	LM
• Jordan <sup>78, 79</sup>	LM
• Lebanon <sup>79</sup>	UM
• Libya <sup>79</sup>	UM

• Morocco <sup>78, 79</sup>	LM
• Palestinian-administered Areas <sup>79</sup>	LM
• Syrian Arab Rep. <sup>79</sup>	LM
• Tunisia <sup>78, 79</sup>	LM

#### WESTERN

#### BALKAN

#### COUNTRIES

#### (WBC)

• Kosovo <sup>80</sup>	LM
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\*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.

In accordance with Article 12(1) of the Rules for Participation in FP7, 'International Cooperation Partner Country' (ICPC) means a third country which the Commission classifies as a low-income (L), lower-middle-income (LM) or upper-middle-income (UM) country. Countries associated to the Seventh EU Framework Programme do not qualify as ICP Countries and therefore do not appear in this list.

<sup>77</sup> Legal entities established in countries in which the European Union under Articles 75 and 215 of the Treaty on the Functioning of the European Union 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.

<sup>78</sup> Signed an agreement with the EU covering Science & Technology.

<sup>79</sup> These countries are also part of the European Neighbourhood Policy (ENP).

<sup>80</sup> As defined by UNSC resolution 1244 of 10 June 1999.

<sup>81</sup> Until the country becomes Associated to FP7.

<sup>82</sup> Legal entities established in the high-income-territories Hong-Kong, Macao and Taiwan, are not eligible under the ICPC provisions.

## **Annex 1.2 Other Third Countries eligible for the International Research Staff Exchange Scheme (IRSES) <sup>83</sup>**

- **Countries with EU International agreements on Science and Technology:**

Algeria\*, Argentina\*, Australia, Brazil\*, Canada, Chile\*, China\*<sup>84</sup>, Egypt\*, India\*, Japan, Jordan\*, Mexico\*, Morocco\*, New Zealand, Rep. of Korea, Russia\*, South Africa\*, Tunisia\*, Ukraine\*, United States.

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

- Eastern Partnership Countries: Armenia\*, Azerbaijan\*, Belarus\*, Georgia\*, Moldova\*<sup>85</sup>, Ukraine\*<sup>85</sup>.

and

- Mediterranean Partnership Countries (MPC) that are not associated countries: Algeria\*, Egypt\*, Jordan\*, Lebanon\*, Libya\*, Morocco\*, Palestinian-administrated areas\*, Syrian Arab Rep.\*, Tunisia\*.

\* International Cooperation Partner Countries (ICPC) eligible for funding in IRSES

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

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

<sup>83</sup> and which are not associated countries for the purpose of FP7.

<sup>84</sup> Hong-Kong and Macao are eligible to participate, but not for the EU contribution as specified in section 4.3.2.

<sup>85</sup> Until the country becomes associated to 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 or by the Research Executive Agency 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 this work programme

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

### **Evaluation criteria**

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

- scientific and/or technological excellence;
- relevance to the objectives of the People Programme<sup>86</sup>;
- quality and implementation capacity of the applicants (researchers/organisations) and their potential for further progress;
- quality of the proposed activity in scientific training and/or transfer of knowledge.

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 'Rules on Submission of Proposals and the Related Evaluation, Selection and Award Procedures'.

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

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

Notes:

1. Evaluation scores will be awarded for each of the criteria, and not for the sub-criteria. Each criterion will be scored out of 5.

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<sup>86</sup> Relevance: A proposal may be partially relevant if it addresses only marginally the topic(s) of the call, or if only part of the proposal addresses them. Such conditions will be reflected in the evaluation of the first criterion ('S/T quality'). The degree to which a proposal is relevant to the objectives of a call will be reflected in the evaluation of the fourth/fifth criterion ('impact'). Proposals that are clearly not relevant to a call ('out of scope') will be rejected on eligibility grounds before the evaluation.

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.
3. In the following tables, for the Funding Scheme ‘Support for Training and Career Development of Researchers’, and for the Funding Scheme ‘Coordination and Support Actions’, the criterion 'Implementation', corresponds to the selection criteria in the meaning of Article 115 of the Financial Regulation and its Implementing Rules. This will also be the basis for assessing the operational capacity of participants. The other criteria correspond to the award criteria.

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

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

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

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

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

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

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

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

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

<b>1.1 ITN - Funding Scheme 'Support for Training and Career Development of Researchers': Marie Curie Initial Training Networks</b>			
<b>Criteria</b>			
<b>S&amp;T Quality (award)</b> Threshold: 3, Weighting:30%	<b>Training (award)</b> Threshold: 4, Weighting:30%	<b>Implementation (selection)</b> Threshold: 3, Weighting:20%	<b>Impact (award)</b> Threshold: 4, Weighting:20%
<b>Priority in case of ex aequo</b>			
<b>3</b>	<b>1</b>	<b>4</b>	<b>2</b>
S&T objectives of the research programme, including in terms of inter/multi-disciplinary, intersectoral and/ or newly emerging supra-disciplinary fields.	Quality of the training programme. - Contribution and relevance to the training programme of the private sector and, where appropriate, of other socio-economic actors. - Transferable skills offered: entrepreneurship, management, communication, standardisation, management of IPR, ethics, grant writing, take up and exploitation of results, research policy, etc. - Quality of supervision *	Capacities (expertise / human resources, especially regarding supervision/ facilities / infrastructures/private sector involvement) to achieve the research training programme and access of fellows to these resources. Adequacy of task distribution and schedule.  Adequate exploitation of complementarities and synergies among partners in terms of research and training, including well targeted secondments to the private sector and to other socio-economic actors where relevant.	Contribution of the proposed training programme to: * - structure training at doctoral level with the acquisition of key skills needed in both the public and private sectors; - improve career prospects and employability of researchers, including ERs where appropriate; - stimulate creativity and entrepreneurial mindset of researchers at doctoral level.
Scientific quality of the research training programme.	Importance and timeliness of the training needs (e.g. multidisciplinary, intersectoral, and newly emerging supra-disciplinary fields)	Private sector involvement at the highest possible level appropriate to the research topic, and sufficient evidence of commitment.	Contribution of the training programme to the policy objective of structuring the initial research training capacity at European level (through establishing longer term collaborations and /or lasting structured training programmes between the partners' organisations).
Where relevant, appropriateness of research methodology and approach.	Appropriateness of the size of the requested training programme with respect to the capacity of the host	How essential is non-ICPC Third Country funding, if any, to the objectives of the research training programme.	The contribution of the training programme towards the policy objective of enhancing public-private sector collaborations in terms of research training.
Originality and innovative aspect of the research training programme.	a) For ITNs and IDPs: Meaningful exposure of each researcher to another sector, in particular through secondments. b) For EIDs: Appropriate time spent by the ESR in each sector.	Networking and dissemination of best practice among partners. Where appropriate, clarity of the plan for organizing training events (e.g. workshops, conferences, training courses).	Where appropriate, mutual recognition by all partners of the training acquired, including training periods in the private sector. *
Contribution of the private sector and, where relevant, other socio-economic actors in the research programme	a) For ITNs and IDPs: Adequate combination of local specialist training with network-wide training activities. b) For EIDs: Adequate supervision arrangements and combination of local specialist training with wide training activities	Appropriateness of the plans for the overall management of the training programme (demarcation of responsibilities, rules for decision making, composition of supervisory board including involvement of the private sector); also working conditions, transparency of recruitment process and career development. *	Where appropriate, plans for exploitation of results.  Impact of the proposed outreach activities.*

\* Sub-criteria to be evaluated in the light of the principles of the 'European Charter for Researchers' and the 'Code of Conduct for the Recruitment of Researchers'  
[http://ec.europa.eu/eracareers/pdf/am509774CEE\\_EN\\_E4.pdf](http://ec.europa.eu/eracareers/pdf/am509774CEE_EN_E4.pdf)

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

Criteria				
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) Threshold: 3.5; Weighting:20%
Priority in case of ex aequo				
3	2	1	5	4
Research/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal	Clarity and quality of the research training objectives for the researcher	Research experience **	Quality of infrastructure / facilities and International collaborations of host	Impact of competencies acquired during the fellowship on the future career prospects of the researcher, in particular through exposure to transferable skills training with special attention to exposure to the industry sector, where appropriate *
Appropriateness of research methodology and approach	Relevance and quality of additional research training as well as of transferable skills offered, with special attention to exposure to the industry sector, where appropriate *	Research results including patents, publications, teaching etc., taking into account the level of experience	Practical arrangements for the implementation and management of the research project *	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	Measures taken by the host for providing quantitative and qualitative mentoring/tutoring	Independent thinking and leadership qualities	Feasibility and credibility of the project, including work plan	Benefit of the mobility to the European Research Area
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 *	Development of lasting cooperation and collaborations with other countries
Host research expertise in the field		Potential for reaching or re-enforcing a position of professional maturity *		Contribution to European excellence and European competitiveness regarding the expected research results
Quality of the group/scientist in charge		Potential to acquire new knowledge		Impact of the proposed outreach activities *

\* Sub-criteria to be evaluated in the light of the principles of the 'European Charter for Researchers' and the 'Code of Conduct for the Recruitment of Researchers'.  
[http://ec.europa.eu/eracareers/pdf/am509774CEE\\_EN\\_E4.pdf](http://ec.europa.eu/eracareers/pdf/am509774CEE_EN_E4.pdf)

\*\* Any leave of absence in the research career of more than one year such as maternity/parental leave, sick or family care leave, military service, humanitarian aid work, etc. will be taken into account.

## 2.2 CIG Funding Scheme 'Support for Training and Career Development of Researchers': Marie Curie Career Integration Grants

Criteria			
S&T Quality (award) Threshold: 3, Weighting:30%	Researcher (award) Threshold: 3, Weighting:30%	Implementation (selection) Weighting:15%	Impact (award) Weighting:25%
Priority in case of ex aequo			
2	1	4	3
Research/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal	Research career potential	Quality of the host organisation, including adequacy of infrastructures and facilities	Contribution to research excellence by attracting and retaining first class researchers
Appropriateness of research methodology and approach	Research and technological quality of previous research **	Feasibility and credibility of the project, including the work plan	Potential and quality of the researcher's long term professional integration in Europe*: <ul style="list-style-type: none"> <li>- expected impact on the future career development of the researcher</li> <li>- expected length of the employment contract</li> <li>- attractiveness of the remuneration package</li> </ul>
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 research project *	Potential of transferring knowledge to the host organisation
Timeliness and relevance of the project	Match between the fellow's profile and project		Capacity to develop lasting co-operation and collaborations with other countries
			Plans for dissemination and exploitation of results
			Impact of the proposed outreach activities *

\* Sub-criteria to be evaluated in the light of the principles of the 'European Charter for Researchers' and the 'Code of Conduct for the Recruitment of Researchers'.  
[http://ec.europa.eu/eracareers/pdf/am509774CEE\\_EN\\_E4.pdf](http://ec.europa.eu/eracareers/pdf/am509774CEE_EN_E4.pdf)

\*\* Any leave of absence of more than one year such as maternity/parental leave, sick or family care leave, military service, humanitarian aid work, etc. will be taken into account.

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

<b>Criteria</b>		
<b>Quality of the selection process for the fellows under the programme (award)</b> <i>Weighting:30%</i>	<b>Implementation - Management of the programme (selection)</b> <i>Weighting:30%</i>	<b>Relevance and Impact to “Life-long training and Career development” (award)</b> <i>Weighting:40%</i>
<b>Priority in case of ex aequo</b>		
<b>2</b>	<b>1</b>	<b>3</b>
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 the 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 the possibility to resume a research career after a break) *
	Appropriateness of the scale of the programme	Relevance for the ERA of the research field covered by the programme's calls
	Future development of the programme	Impact of the programme to the development of the researchers' careers in the ERA

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

[http://ec.europa.eu/eracareers/pdf/am509774CEE\\_EN\\_E4.pdf](http://ec.europa.eu/eracareers/pdf/am509774CEE_EN_E4.pdf)

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

Criteria			
S&T Quality (award) Threshold 3, Weighting:25%	Transfer of knowledge (award) Threshold 3, Weighting:30%	Implementation (selection) Threshold 3, Weighting:20%	Impact (award) Threshold 3, Weighting:25%
Priority in case of ex aequo			
2	1	4	3
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 and lasting intersectoral collaborations. Extent to which SMEs contribute to the project, where appropriate.
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 exploitation/commercialisation of the results.
Appropriateness of research methodology and approach.	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/secondment strategy, IPR strategy, demarcation of responsibilities, rules for decision making, etc); also working conditions, transparency of recruitment process and career development. *	Impact on the innovation potential of the European Research Area. In the relevant fields, description of potential applications.
Originality and innovative aspect of the research programme. Knowledge of the state-of-the-art.		How essential is non-ICPC third country funding, if any, to the objectives of the research training programme.	Facilitation of sharing knowledge and culture between the participants and external researchers (including international conferences, workshops, training events). *
		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.	Impact of the proposed outreach activities. *

\* Sub-criteria to be evaluated in the light of the principles of the 'European Charter for Researchers' and the 'Code of Conduct for the Recruitment of Researchers'.  
[http://ec.europa.eu/eracareers/pdf/am509774CEE\\_EN\\_E4.pdf](http://ec.europa.eu/eracareers/pdf/am509774CEE_EN_E4.pdf)

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

Criteria				
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 <sup>rd</sup> country institution and the European host	Impact (award) Threshold: 3.5; Weighting:20%
Priority in case of ex aequo				
3	2	1	5	4
Research/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal	Clarity and quality of the research training objectives for the researcher	Research experience **	Quality of infrastructure / facilities and International collaborations of host (outgoing and return host)	Impact of competencies acquired during the fellowship on the future career prospects of the researcher, in particular through exposure to transferable skills training *
Appropriateness of research methodology and approach	Relevance and quality of additional research training, as well as transferable skills offered *	Research results including patents, publications, teaching etc., taking into account the level of experience	Practical arrangements for the implementation and management of the research project (outgoing and return host) *	Contribution to career development, or re-establishment where relevant. *
Originality and innovative nature of the project and relationship to the 'state of the art' of research in the field	Host expertise in training experienced researchers in the field and capacity to provide mentoring/tutoring (outgoing and return host) *	Independent thinking and leadership qualities	Feasibility and credibility of the project, including work plan	Potential for creating long term collaborations and mutually beneficial co-operation between Europe and the other third country
Timeliness and relevance of the project		Match between the fellow's profile and project.	Practical and administrative arrangements, and support for the hosting of the fellow (outgoing and return host) *	Contribution to European excellence and European competitiveness through valuable transfer of knowledge during the return phase
Host research expertise in the field (outgoing and return host)		Potential for reaching a position of professional maturity*		Impact of the proposed outreach activities *
Quality of the group/scientist in charge (outgoing and return host)		Potential to acquire new knowledge		

\* Sub-criteria to be evaluated in the light of the principles of the 'European Charter for Researchers' and the 'Code of Conduct for the Recruitment of Researchers'  
[http://ec.europa.eu/eracareers/pdf/am509774CEE\\_EN\\_E4.pdf](http://ec.europa.eu/eracareers/pdf/am509774CEE_EN_E4.pdf)

\*\* Any leave of absence in the research career of more than one year such as maternity/parental leave, sick or family care leave, military service, humanitarian aid work, etc. will be taken into account.

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

Criteria				
S&T Quality (award) Threshold: 3, Weighting:25%	Transfer of knowledge (award) Weighting:15%	Researcher (award) Threshold: 4, Weighting:25%	Implementation (selection) Weighting:15%	Impact (award) Threshold: 3.5; Weighting:20%
Priority in case of ex aequo				
3	2	1	5	4
Research/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal	Clarity and quality of the transfer of knowledge objectives	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 other third country
Appropriateness of research methodology and approach	Potential of transferring knowledge to European host and/or bringing knowledge to Europe	Research results including patents, publications, teaching etc.	Practical arrangements for the implementation and management of the research project *	Contribution to European excellence and European competitiveness through valuable transfer of knowledge
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	Impact of the proposed outreach activities *
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 research expertise in the field				
Quality of the group/scientist in charge				

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

[http://ec.europa.eu/eracareers/pdf/am509774CEE\\_EN\\_E4.pdf](http://ec.europa.eu/eracareers/pdf/am509774CEE_EN_E4.pdf)

### 4.3 IRSES Funding Scheme 'Support for Training and Career Development of Researchers': International Research Staff Exchange Scheme

Criteria			
Quality of the Exchange Programme Weighting:25%	Transfer of Knowledge Threshold: 3, Weighting:30%	Implementation Weighting:15%	Impact Threshold: 3, Weighting:30%
Priority in case of ex aequo			
1	2	4	3
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 European Research Area
Research 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, in particular in view of setting-up joint research projects
Complementarities/synergies between the partners			

\* Sub-criteria to be evaluated in the light of the principles of the 'European Charter for Researchers' and the 'Code of Conduct for the Recruitment of Researchers'.  
[http://ec.europa.eu/eracareers/pdf/am509774CEE\\_EN\\_E4.pdf](http://ec.europa.eu/eracareers/pdf/am509774CEE_EN_E4.pdf)

**5. Funding Scheme 'Coordination and Support Actions': Researchers' NIGHT, EURAXESS-IU and EURAXESS Faroe Islands (grant to a named beneficiary)**

Criteria		
Research 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
Priority in case of ex aequo		
2	3	1
Soundness of concept, and quality of objectives	Appropriateness of the management structure and procedures Quality and relevant experience of the individual participants	Contribution, at the European [and/or international] level, to the expected impacts listed in the work programme under relevant topic/Activity
In case of Coordinating Action: Contribution to the co-ordination of high quality research	Quality of the consortium as a whole (including complementarity, balance) [for Support Actions: only if relevant]	Appropriateness of measures for spreading excellence, exploiting results, and dissemination knowledge, through engagement with stakeholders, and the public at large.
In case of Coordinating Action: Quality and effectiveness of the co-ordination mechanisms, and associated work plan	Appropriateness of the allocation and justification of the resources to be committed (budget, staff, equipment)	
In case of Supporting Action: Quality and effectiveness of the support action mechanisms, and associated work plan		

### **Annex 3 European Union contribution and applicable rates**

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

The financial contribution of the European Union 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 flat rates according to rates for certain expenses. The European Union 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.

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

Table 3.1 gives the yearly reference rates for calculating the monthly living allowances of each eligible researcher. The amounts per year are given in Euros per category of researchers who are recruited under an employment contract. These amounts include the provisions for all compulsory deductions under national applicable legislation.

**Table 3.1: Yearly reference rates for monthly living allowances under employment contracts (Correction Coefficient index 100)<sup>87</sup>**

<b>Researchers Categories</b>	<b>EUR/year</b>
Early-stage researchers	<b>38 000</b>
Experienced researchers (< 10 years experience)	<b>58 500</b>
Experienced researchers (>10 years experience)	<b>87 500</b>

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

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

Concerning parental leave benefits it has to be noted that the Commission can decide, on request by the researchers and the host organisation, to augment the sum of the European Union contribution for the reimbursement of compulsory and non-recoverable costs under the applicable national law. Such a request, supported by the pertinent documents, has to be submitted with the final reports at the end of the project. Calculated on a monthly basis, the

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<sup>87</sup> Rates for individual countries are obtained by applying to these rates the correction coefficients for cost of living, as referred in Table 3.3.

contribution shall not exceed the difference between the compensation received from the national social insurance regime and the amount of the European Union contribution mentioned in Table 3.1.

In addition to the living allowance, a mobility allowance will be paid for some categories of researchers as specified in Table 3.3, which will take due account of the family situation of the researcher. In this context family is defined as persons linked to the researcher by (i) marriage, or (ii) a relationship with equivalent status to a marriage recognised by the national legislation of the country of the host organisation or of the nationality of the researcher; or (iii) dependent children who are actually being maintained by the researcher. This allowance is a flat rate contribution to cover personal household, relocation and travel expenses.

The various rates resulting from Tables 3.1 to 3.3 are for researchers devoting themselves to their project on a full-time basis (pro-rata for parts of years). In exceptional cases, where researchers, in agreement with the host organisation, and with prior approval by the Research Executive Agency, execute their project on a part-time basis, the rates will apply proportionally without the possibility that the total amounts will exceed those that apply for full-time equivalent periods. The same principle will also apply in case of split of a project into several distinct periods.

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

The upper limits provided for in the Rules for Participation (Article 33) for the European Union financial contribution are summarised in the following table.

	Non-profit public bodies, secondary and higher education establishments, <a href="#">research organisations</a> and SMEs	All other organisations
Coordination and Support Actions	100%	100%

**Table 3.2 Correction Coefficients**

**The 27 EU Member States<sup>88</sup>**

Austria	106.2
Belgium**	100.0
Bulgaria	62.7
Cyprus	83.7
Czech Republic	84.2
Denmark*	134.1

Estonia	75.6
Finland	119.4
France	116.1
Germany	94.8
Greece	94.8
Hungary	79.2

Ireland	109.1
Italy	106.6
Latvia	74.3
Lithuania	72.5
Luxembourg**	100
Malta	82.2

Netherlands	104.1
Poland	77.1
Portugal	85.0
Romania	69.5
Slovak Rep.	80.0
Slovenia	89.6

Spain	97.7
Sweden	118.6
UK	134.4

\* **The rate for Denmark also applies for The Faroes**

\*\* Belgium and Luxembourg are the basis of the correction coefficient which is therefore always static at 100.0

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<sup>88</sup> Based on the Council Regulation (EC) No 1239/2010 of 20 December 2010 (OJ L338 of 22.12.2010, p.2/3) adjusting the correction coefficients applicable to the remuneration of officials of the European Union.

## The non-EU Countries and New Caledonia (French overseas territory)<sup>89</sup>

<b>Albania</b> ***	<b>66.7</b>	Canada	78.9	Ethiopia***	78.4	Japan	105.0	<b>Montenegro</b> ***	<b>64.6</b>	Samoa	79.9	<b>The Faroes</b>	<b>134.1</b>
Algeria***	69.4	Cape Verde	74.4	Fiji****	62.7	Jordan	70.0	Morocco**	78.3	Saudi Arabia****	76.2	East Timor****	85.1
Angola****	108.5	Cen African Rep.	113.1	<b>FYROM</b> ***	<b>60.6</b>	Kazakhstan****	85.1	Mozambique****	71.0	Senegal	88.1	Togo	87.0
Argentina***	59.0	Chad***	114.6	Gabon	110.4	Kenya**	75.9	Namibia*	58.0	<b>Serbia</b> ***	<b>74.0</b>	Tonga	85.0
Armenia****	69.0	Chile**	59.0	Gambia****	75.7	Kosovo***	58.5	Nepal***	68.6	Sierra Leone****	107.8	Trinidad & Tobago****	
Australia***	99.5	China**	94.8	Gaza Strip	103.1	Kyrgyzstan****	76.3	NewCaledonia****	112.5	Singapore	95.8		78.4
Azerbaijan**	94.0	Colombia**	76.9	Georgia****	76.8	Laos****	87.1	New Zealand****	90.9	Solomon Islands***	90.7	Tunisia	68.7
Bangladesh	45.4	Congo****	116.2	Ghana****	65.1	Lebanon***	73.5	Nicaragua***	56.3	South Africa**	48.0	<b>Turkey</b> ****	<b>97.7</b>
Barbados****	104.9	Costa Rica*	83.1	Guatemala****	73.0	Lesotho**	47.7	Niger***	90.4	South Korea****	106.5	Uganda***	69.2
Belarus****	64.3	Côte d'Ivoire	99.9	Guinea****	70.4	Liberia***	92.5	Nigeria***	89.7	Sri Lanka***	69.9	Ukraine***	64.5
Benin	92.9	<b>Croatia</b> ****	<b>81.8</b>	Guinea-Bissau***	98.3	Libya***	57.6	<b>Norway</b> ****	<b>130.7</b>	Sudan****	79.0	Uzbekistan**	51.8
Bermuda	151.5	Cuba****	76.6	Guyana	53.5	<b>Liechtenstein</b> **	<b>109.9</b>	Pakistan****	46.8	Surinam****	58.7	US**	101.3
Bolivia	49.5	Dem Rep Congo**		Haiti****	94.3	Madagascar****	73.9	Panama	52.2	Swaziland*	48.7	Uruguay	72.1
<b>Bosnia&amp; Herzegovina</b> **	<b>68.1</b>		118.8	Honduras	60.3	Malawi****	81.8	Papua New Guinea**		<b>Switzerland</b> **	<b>109.9</b>	Vanuatu	105.6
Botswana*	47.9	Djibouti	85.4	Hong Kong	83.4	Malaysia***	65.0		89.2	Syria**	82.4	Venezuela****	69.2
Brazil	95.5	Dominican Rep.*	63.2	<b>Iceland</b> ***	<b>79.9</b>	Mali****	97.1	Paraguay****	65.2	Taiwan	77.3	Vietnam***	43.6
Burkina Faso	96.5	Ecuador*	68.3	India***	55.8	Mauritania	61.2	Peru	67.4	Tajikistan***	58.3	West Bank	103.1
Cambodia***	71.7	Egypt****	54.2	Indonesia****	74.8	Mauritius	72.6	Philippines****	75.6	Tanzania***	67.9	Yemen****	67.7
Cameroon**	98.2	El Salvador	63.6	<b>Israel</b> ***	<b>96.4</b>	Mexico**	65.3	Russia***	93.6	Thailand****	79.1	Zambia****	77.1
		Eritrea****	90.9	Jamaica****	93.6	Moldova****	60.5	Rwanda	82.7				

<sup>89</sup> Based on the Council Regulation (EC) No 613/2009 of 6 July 2009 (OJ L181 of 14.7.2009, p.1). For countries where the correction coefficient is not available, the Commission will decide on a case-by-case basis.

\* These correction coefficients are the weightings applicable in third countries as per Articles 12 and 13 of Annex X to the Staff Regulations published in IA N°71-2009 27/11/2009

\*\* These correction coefficients are the weightings applicable in third countries as per Articles 12 and 13 of Annex X to the Staff Regulations published in IA N°18-2010 10/03/2010

\*\*\* These correction coefficients are the weightings applicable in third countries as per Council Regulation (EC) No 790/2010 of 15 December 2010 (OJ L336 of 21.12.2010, p.50)

\*\*\*\* These correction coefficients are the weightings applicable in third countries as per Council Regulation (EC) No 313/2011 of 26 May 2011 (OJ L140 of 25.05.2011, p.56).

Countries in bold and italics are associated countries (see list available at [ftp.cordis.europa.eu/pub/fp7/docs/third\\_country\\_agreements\\_en.pdf](http://ftp.cordis.europa.eu/pub/fp7/docs/third_country_agreements_en.pdf)). For The Faroes, the rates for Denmark apply.

**Table 3.3. Structure of the European Union contribution (For COFUND, CIG and IRSES, financial details are given in the text)**

Host Driven Actions (ITN and IAPP)	- 1 - Monthly living allowance	- 2 - Monthly mobility allowance	- 3 - Contribution to the training expenses of eligible researchers and research/transfer of knowledge programme expenses	- 4 - Management activities (including audit certification if applicable)	- 5 - Contribution to overheads	- 6 - Other types of eligible expenses / specific conditions
Marie Curie Initial Training Networks and Industry-Academia Partnerships and Pathways	<p><b>Monthly living allowance:</b> flat rate as specified in Table 3.1.</p> <p>Rate for individual countries is obtained by applying the correction coefficient (as referred to in Table 3.2) to these rates.</p>	<p><b>Monthly mobility allowance:</b> flat rate allowance to cover expenses linked to the personal household, relocation and travel expenses of the researcher and her/his family in the host country: reference rate of EUR 700 for researchers without a family and EUR 1000 for researchers with a family.</p> <p>Rate for individual countries is obtained by applying the correction coefficient (as referred to in Table 3.2) to these rates.</p>	<p><b>For multi-partner ITNs and IAPP:</b> Flat rate of EUR 1800 per researcher-month managed by the host organisations to contribute for expenses related to the participation of researchers to training activities; expenses related to research costs; execution of the training/partnership project and contribution to the expenses related to the co-ordination between participants.</p> <p><b>For EID and IPD:</b> Flat rate of EUR 1200 per researcher-month managed by the host organisation(s) to contribute for expenses related to the participation of eligible researchers to training activities and expenses related to research costs, as well as to contribute to the expenses related to the co-ordination between participants.</p>	<p>Maximum of 10% of the total European Union contribution.</p>	<p>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>	<p><b>Applicable only to IAPP and for participating SMEs<sup>90</sup> only:</b></p> <p>Small equipment expenses up to a maximum of 10% of the total contribution to the SME participant, if: duly justified for the project, on the basis of real costs and after prior agreement by the REA.</p>

<sup>90</sup> According to Commission Recommendation 2003/361/EC of 6 May 2003 concerning the definition of micro, small and medium-sized enterprises.

Individual driven Actions	- 1 - Monthly living allowance	- 2 - Monthly mobility allowance	- 3 - Contribution to the training expenses of eligible researchers and research/transfer of knowledge programme expenses	- 4 - Management activities (including audit certification if applicable)	- 5 - Contribution to overheads	- 6 - Other types of eligible expenses / specific conditions
Marie Curie Intra European/International Outgoing/Incoming International/Fellowships for career development	<p><b>Monthly living allowance:</b> flat rate as specified in Table 3.1.</p> <p>Rate for individual countries is obtained by applying the correction coefficient (as referred to in Table 3.2) to these rates.</p>	<p><b>Monthly mobility allowance:</b> flat rate allowance to cover expenses linked to the personal household, relocation and travel expenses of the researcher and her/his family in the host country: reference rate of EUR 700 for researchers without a family and EUR 1000 for researchers with a family.</p> <p>The reference date for the family situation is the relevant deadline for the submission of proposals.</p> <p>Rate for individual countries is obtained by applying the correction coefficient (as referred to in Table 3.2) to these rates.</p>	<p>Flat rate of EUR 800 per researcher-month managed by the host organisation to contribute for expenses related to the participation of eligible researchers to training activities and expenses related to research costs.</p>	<p>N/A</p>	<p>Flat rate of EUR 700 per researcher-month.</p> <p>Rate for individual countries is obtained by applying the correction coefficient (as referred to in Table 3.2) to these rates.</p>	<p><b>Incoming International Fellowships/possible return phase single flat rate:</b> contribution managed by the hosting organisation for expenses related to the integration of the researcher in the host institution. Composed of a flat rate of EUR 15 000 per researcher/year during the period of reintegration up to a maximum of 1 year.</p>