



# GUIDE FOR APPLICANTS

## Marie Curie Actions *People*

International Research Staff Exchange Scheme  
Call identifier FP7-PEOPLE-IRSES-2008  
Closing Date: 28 March 2008 at 17:00:00 (Brussels local time)

## About this Guide

**This Guide explains the principles of Marie Curie International Research Staff Exchange Scheme to be funded under the EU's Seventh Framework Programme.**

Similar documents are available for the other Marie Curie Actions namely:

Marie Curie Initial Training Networks (ITN)  
Marie Curie European Reintegration Grants (ERG)  
Marie Curie Co-funding of Regional, National, and International Programmes (COFUND)  
Marie Curie Industry-Academia Partnerships and Pathways (IAPP)  
Marie Curie Researchers Night (NIGHT)  
Marie Curie Intra-European Fellowships for Career Development (IEF),  
Marie Curie International Outgoing Fellowships for Career Development (IOF)  
Marie Curie International Incoming Fellowships (IIF)  
Marie Curie International Reintegration Grants (IRG)

**The structure required for a proposal, and the rules which will govern its evaluation, vary according to the type of action and may also vary from call to call. It is therefore important to ensure that you are using the right guide.**

**Please check that this is the right guide for you by consulting the Work Programme, the call text and the description of the Marie Curie Action in section 2.**

### *Please note:*

**This Guide is based on the rules and conditions contained in the legal documents relating to FP7 (in particular the Seventh Framework Programme, Specific Programmes, Rules for Participation, and the Work programmes), all of which can be consulted via the CORDIS<sup>1</sup> website (<http://cordis.europa.eu>).**

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

<sup>1</sup> COmmunity R&D Information System  
(Version 9 November 2007)

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## THE ESSENTIALS

### What is IRSES?

The Marie Curie International Research Staff Exchange Scheme aims at strengthening research partnerships through short period staff exchanges and networking activities between European research organisations and organisations from countries with which the Community has an S&T agreement or are in the process of negotiating one<sup>13</sup>, and countries covered by the European Neighbourhood policy.

### Who can apply?

Public or private bodies which carry out research can participate in this action. A partnership in this action shall be composed of at least two independent participants established in at least two different EU Member States (MS) or Associated countries (AC), and one or more organisation(s) located either in countries with which the EU has an S&T Agreement or in countries covered by the European Neighbourhood Policy. One of the MS/AC partners will be the coordinator of the project.

### Which research topics are supported?

All Marie Curie actions have a **bottom-up approach**, i.e. research fields are chosen freely by the applicants. All domains of research and technological development addressed under the EC Treaty are eligible for funding, except areas of research covered by the EURATOM Treaty ([http://europa.eu/scadplus/treaties/euratom\\_en.htm](http://europa.eu/scadplus/treaties/euratom_en.htm)).

### How does it work?

Proposals are submitted within the specified deadlines, and are evaluated by external independent experts against a series of predetermined criteria. A staff exchange programme can apply for Community support for a period of 24-48 months. The maximum duration of the individual staff exchanges will be 12 months

### What does the funding cover?

For each member of staff from an EU Member State or Associated country staying in an eligible Third Country, the Community will pay a subsistence allowance for the additional mobility costs of €1,800 per month (including travel costs). In exceptional cases, the costs of stays of staff from certain Third countries in Europe may also be covered (for details see p.12). In all cases, the staff must remain employed by their organisations and are expected to return after the mobility period.

### How to apply?

This Guide contains the essential information for applicants to prepare and submit a proposal for IRSES. Applicants should also consult the relevant legal documents (listed in the Annex 1 of this document) in order to better understand the evaluation process, rules of participation, contractual and financial issues, etc. Proposals are submitted electronically via the Commission's Electronic Proposal Submission Service (EPSS).

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<sup>13</sup> See ANNEX I in the PEOPLE Work Programme 2008 for countries eligible for the IRSES scheme. A list of countries with S&T agreement is also available at [http://ec.europa.eu/research/iscp/index\\_en.cfm?page=Countries](http://ec.europa.eu/research/iscp/index_en.cfm?page=Countries).

## 1. Getting started

Funding decisions in the Seventh Framework Programme (FP7) are made on the basis of **calls** published by the Commission, which solicit **proposals**. Proposals describe a planned international research staff exchange programme and provide information on its content and coordinator/partners. They must be submitted using a special web-based service before a strictly-enforced **deadline**. The Commission evaluates all eligible proposals in order to identify those whose quality is sufficiently high for possible funding. The basis for this **evaluation** is a peer-review carried out by independent experts.

The Commission then **negotiates** with some or all of those whose proposals have successfully passed the evaluation stage, depending on the budget available. If negotiations are successfully concluded, **grant agreements** providing for an EU financial contribution are established with the project coordinator.

This **Guide for Applicants** contains the essential information to guide applicants through the mechanics of preparing and submitting a proposal.

Applicants must also refer to the "**People**" **Work Programme**. This provides a detailed description of the Marie Curie Actions, their objectives and scope, the eligibility criteria, the Community contribution and the evaluation criteria. Work programmes are revised each year, so it is important to refer to the latest version before preparing your proposal.

*Please check that this is the correct guide for you by consulting the Work Programme, the **call fiche**, and the description of the Marie Curie Action in the next section.*

This Guide and the Work Programme are essential reading. However, applicants may also wish to consult other reference and background documents, in particular those relating to negotiation and the grant agreements, which are available on the Commission's CORDIS web site (see Annex 1 of this Guide).

## 2. About the Marie Curie Action: "International Research Staff Exchange Scheme" (IRSES)

### 2.1. General aspects

#### Purpose

The Marie Curie International Research Staff Exchange Scheme is a new instrument which aims to strengthen research partnerships through staff exchanges and networking activities between European research organisations and organisations from countries with which the Community has an S&T agreement and countries covered by the European Neighbourhood policy. Compared to standard Marie Curie actions, which provide mobility possibilities to individual researchers with a training or career development objective, this new action will provide support to research organisations to establish or reinforce long-term research co-operation through a coordinated joint programme of exchange of researchers for shorter periods.

#### Size

There is no minimum or maximum size of an exchange programme. The number of staff exchanged should correspond with the size and capacities of the involved partner organisations.

#### Balanced exchanges

Independently of the size of an exchange programme, it is expected that the exchanges out of Europe are roughly in balance (in terms of person months) with those into Europe.

#### Participants

Public or private bodies which carry out research can participate in this action. A partnership in this action shall be composed of at least two independent participants established in at least two different EU Member States or Associated Countries, and one or more organisation(s) either located in countries with which the EU has an S&T Agreement or in countries covered by the European Neighbourhood Policy.

#### Duration

A staff exchange programme can apply for Community support for a period of 24-48 months.

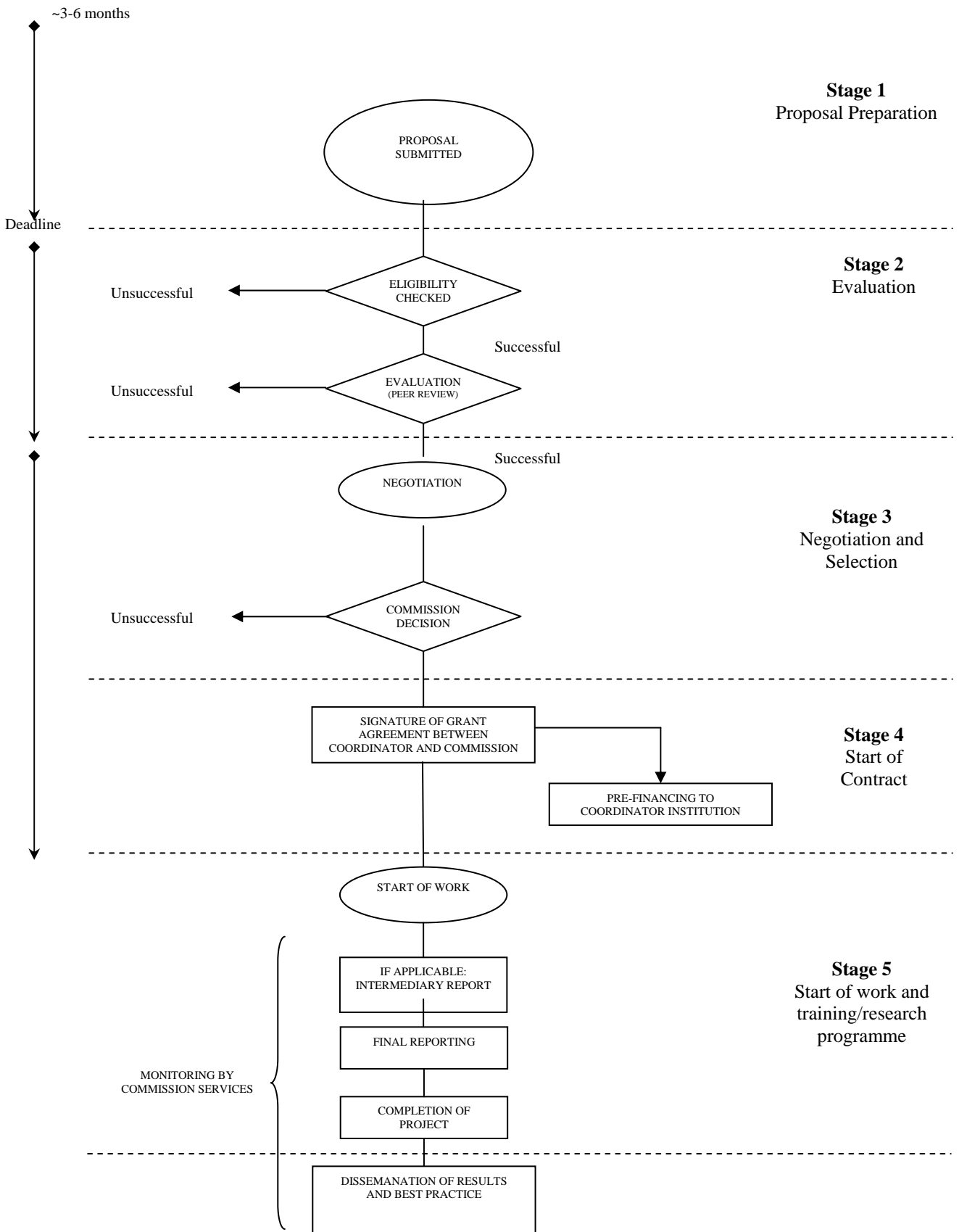
The maximum duration of the individual staff exchanges will be 12 months, which can be split into several exchange periods within the total duration of the programme. Very short stays in the eligible Third countries, **other** than for the attendance of workshops and seminars specifically organised as part of the joint collaboration programme, will not be covered by the Community contribution.

#### Thematic Areas of IRSES Programmes

All Marie Curie actions have a bottom-up approach, i.e. all fields of research of interest to the European Union are eligible for funding, except areas of research covered by the EURATOM Treaty ([http://europa.eu/scadplus/treaties/euratom\\_en.htm](http://europa.eu/scadplus/treaties/euratom_en.htm)). Proposed IRSES programmes can cover any scientific disciplines, but can also focus on a specific discipline. In this case the range covered should allow reasonable flexibility for the participant researcher.

LIFE CYCLE OF AN IRSES ACTION

Publication of the call



## 2.2. Eligible participants

Public or private non-profit bodies, which carry out research, are eligible to participate in IRSES.

A partnership in this action shall be composed of at least two independent participants established in at least two different Member States or Associated countries, and one or more organisations either located in countries with which the EU has an S&T Agreement or in countries covered by the European Neighbourhood Policy. The partner acting as proposal coordinator must be from an EU Member State or Associated country.

The lists below are subject to change and it is the responsibility of the applicant to check their memberships at the time of application.

### **The EU 27 Member States:**

*Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, and the United Kingdom.*

### **The Associated countries:**

*a) Croatia, FYR Macedonia, Iceland, Israel, Liechtenstein, Norway, Serbia, Switzerland and Turkey*

*b) Albania and Montenegro, as of 1 January 2008 (subject to satisfactory completion of the decision-making procedure associating these countries via a Memorandum of Understanding)*

*Other countries may become associated during the course of FP7. The latest news will be posted on the CORDIS web site.*

### **Countries with an S&T agreement with the EC**

*Argentina, Australia, Brazil, Canada, China, Chile, Egypt, India, Japan\*, (Rep. of) Korea, Mexico, Morocco, New Zealand, Russia, South Africa, Tunisia, Ukraine, Unites States*

### **Countries covered by the European Neighbourhood Policy (but which are not Associated countries for the purpose of FP7)**

#### **a) Eastern Europe & Central Asia (EECA)**

*Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine)*

#### **b) Mediterranean Partner Countries (MCP)**

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

\* Currently in the process of negotiating an S&T cooperation agreement with the European Community

## 2.3. Eligible staff and eligible programmes

Participants will submit a joint multi-annual programme for the exchange of staff between the partners. For staff from EU Member States or Associated countries, the mobility must be towards the Third Country partners and vice-versa. Staff exchanged between European partners will not be eligible to apply for the subsistence allowance paid by the Community.

The IRSES scheme targets early stage and experienced researchers, but if appropriate and justified, technical and managerial staff can also benefit from the exchange programme.

The duration of exchanges for each researcher or technical/managerial staff member will be for a maximum of 12 months. Conference attendance other than for workshops or seminars specifically



organised as part of the joint collaboration project between the partner organisations are not covered by the Community contribution. In any case the need for very short stays, of less than one month, should be particularly well justified in the application.

**Examples:**

An Austrian and a Hungarian university propose an exchange programme with a research institute in Brazil. This programme is **eligible**.

An Irish university proposes an exchange programme with a Chinese university. This programme is **ineligible** (at least two partners from MS/AC are required).

A French research institute and a Swiss company propose an exchange programme with a university in Tunisia. This programme is **ineligible** (only private non-profit organisations can participate in IRSES).

A Spanish and a Portuguese university propose an exchange programme with a research centre in Mozambique. This programme is **ineligible** (Mozambique does neither have an S&T agreement with the EC nor is it covered by the European Neighbourhood Policy).

A Dutch research centre and an Estonian university propose an exchange programme with the USA. Staff from the US partner will be seconded to the Netherlands and Estonia, Dutch staff will be seconded to Estonia and the US and Estonian staff will be seconded to the Netherlands and the US. This exchange programme is **eligible**. However, **the subsistence costs for the Estonian staff going to the Netherlands and the Dutch staff going to Estonia are ineligible**.

## 2.4. Typical Activities of a IRSES Programme

The participants are expected to propose a joint programme as the common basis for their collaboration. This may include joint research and training activities or joint workshops and seminars, as well as other networking activities. The activities should be designed to exploit complementary expertise of the participants and to create synergies between them. In addition to achieving scientific results in a particular area, the IRSES projects are also expected to create additional benefits for the participants in terms of transfer of knowledge.

## 2.5 Financial Regime

**All partners** involved in a joint exchange programme are expected to temporarily "second" their staff and thus **continue paying their salary during the stay abroad**.

For each member of staff from an EU MS or AC staying in an eligible Third Country partner organisation, the Community will pay a subsistence allowance of €1,800 per month.

The subsistence allowance is paid as a fixed contribution expected to cover the costs for the staff exchange, including travel costs and other related costs.

### Financing of Third Country partners

Partner organisations from eligible Third countries are supposed to cover themselves the costs for their "outgoing" staff.

For proposals that passed all evaluation thresholds and were selected for Community funding, the Commission will require evidence of the existence of matching funds at the stage of contract negotiations. It is therefore recommended that Third Country partners take appropriate action to ensure the availability of this evidence.

As far as ICPC countries, and in particular countries covered by the European Neighbourhood policy, are concerned, in specific and well justified cases, a Community contribution towards travel and subsistence for these partners may be envisaged. The justification should be an Annex to Part B of the Proposal (see Annex 4)

**The following Third Countries may benefit from the EC subsistence contribution**

- 1) Countries covered by the European Neighbourhood Policy
- 2) Argentina, Brazil, China, Chile, Egypt, India, (Rep of) Korea, Mexico, Morocco, Russia, South Africa, Tunisia, Ukraine

**Example:**

Two EU Member States or Associated Countries propose a staff exchange programme with a Third Country. The Third Country participants in the IRSES programme are financed by their own funds.

Partner country	Staff to be exchanged	Duration in months	Total person months	Requested community contribution
EU Member State/Associated Country	10 researchers	12	120	216.000
	2 researchers	10	20	36.000
	3 researchers	8	24	43.200
	2 technicians	2	4	7.200
<b>Total</b>			<b>168</b>	<b>302.400</b>
EU Member State/Associated Country	5 researchers	12	60	108.000
	8 researchers	9	72	129.600
	1 technician	6	6	10.800
<b>Total</b>			<b>138</b>	<b>248.400</b>
<b>Total Partners from EU MS/AC</b>			<b>306</b>	<b>550.800</b>
Eligible Third Country	15 researchers	12	180	0
	5 researchers	9	45	0
	10 researchers	6	60	0
	6 researchers	3	18	0
<b>Total Third Country</b>			<b>303</b>	<b>0</b>
<b>Total Programme</b>			<b>609</b>	<b>550.800</b>

**Financial reporting**

The subsistence allowance of 1,800 EUR per month and exchanged member of staff is paid as a fixed contribution. When reporting to the Commission, beneficiaries will not have to provide evidence of actual costs (i.e. cost statements for air travel tickets, evidence how much each researcher has received individually, etc). Reporting will be limited to the accomplished results, which includes number of person-months exchanged and scientific results achieved, under consideration of the objectives set out in the Work Programme.

## 3. How to apply

### 3.1. Turning your idea into an effective proposal

#### The coordinator

The Commission refers to the participant who is taking the lead in the preparation of the proposal as the "proposal coordinator". In the case of IRSES, the coordinator of an exchange project must be a partner from an EU Member State or Associated country. For a given proposal, the coordinator acts as the single point of contact between the participants and the Commission.

#### Focusing your planned work

Refer to the description of the Marie Curie Action in section 2 of this Guide and the Work Programme to check the **eligibility criteria** and any other special conditions that apply.

Refer also to the **evaluation criteria** against which your proposal will be assessed. These are given in annex 2. Keep these in mind as you develop your proposal.

#### National Contact Points

A network of National Contact Points (NCPs) has been established to provide advice and support to organisations which are preparing proposals. Applicants are highly recommended to get in touch with your NCP at an early stage. (Contact details are given on the CORDIS Call page – see [http://cordis.europa.eu/fp7/get-support\\_en.html](http://cordis.europa.eu/fp7/get-support_en.html) or Annex 1 of this Guide). Please note that the Commission will give the NCPs statistics and information on the outcome of the call and the outcome of the evaluation for each proposal. This information is supplied to support the NCPs in their service role, and is given under strict conditions of confidentiality.

Through IRSES, participation of organisations from third countries (which are neither Member States nor Associated countries) in FP7 is encouraged. The Commission has established a database with contacts in third countries who can give assistance to potential participants in these countries and to organisations from Member and Associated States looking for partners in third countries. For the moment, the list of countries is limited. Continuous updates are foreseen. Please see [http://cordis.europa.eu/fp7/third-countries\\_en.html](http://cordis.europa.eu/fp7/third-countries_en.html)

#### Other sources of help

Annex 1 to this guide gives references to these further sources of help for this call. In particular:

- The Commission's general **enquiry service** on any aspect of FP7. Questions can be sent to a single e-mail address and will be directed to the most appropriate department for reply. Please see <http://ec.europa.eu/research/enquiries>.
- A dedicated help desk has been set up to deal with technical questions related to the **Electronic Proposal Submission Service** (EPSS). See section 3.2 below.
- A further help desk providing assistance on intellectual property matters (see CORDIS under [http://cordis.europa.eu/fp7/how\\_en.html#ipr](http://cordis.europa.eu/fp7/how_en.html#ipr))
- Any other guidance documents or background information relating specifically to this call.
- The date and contact address for any **'information day'** that the Commission may be organising for this call.
- Other services, including partner search facilities, provided via the CORDIS web site (see [http://cordis.europa.eu/fp7/partners\\_en.html](http://cordis.europa.eu/fp7/partners_en.html)).

## **Ethical principles**

Please remember that research activities in FP7 should respect fundamental ethical principles, including those reflected in the Charter of Fundamental Rights of the European Union<sup>2</sup>. These principles include the need to ensure the freedom of research and the need to protect the physical and moral integrity of individuals and the welfare of animals. For this reason, the European Commission carries out an ethical review of research proposals when appropriate.

The following fields of research shall not be financed under this Framework Programme:

- research activity aiming at human cloning for reproductive purposes;
- research activity intended to modify the genetic heritage of human beings which could make such changes heritable<sup>3</sup>;
- research activities intended to create human embryos solely for the purpose of research or for the purpose of stem cell procurement, including by means of somatic cell nuclear transfer.

As regards human embryonic stem cell research, the Commission will maintain the practice of the Sixth Framework Programme, which excludes from Community financial support research activities destroying human embryos, including for the procurement of stem cells. The exclusion of funding of this step of research will not prevent Community funding of subsequent steps involving human embryonic stem cells.

## **Presenting your proposal**

A proposal has two parts:

**Part A** will contain the administrative information about the proposal and the participants. The information requested includes a brief description of the work, contact details and characteristics of the participants, and information related to the funding requested (see annex 3 of this Guide). This information will be encoded in a structured database for further computer processing to produce, for example, statistics, and evaluation reports. This information will also support the experts and Commission staff during the evaluation process.

The information in **Part A** is entered through a set of on-line forms.

**Part B** is a "template", or list of headings, rather than an administrative form (see annex 4 of this Guide). Applicants should follow this structure when presenting the scientific and technical content of their proposal. The template is designed to highlight those aspects that will be assessed against the **evaluation criteria**. It covers, among other things, the nature of the proposed work, the participants and their roles in the proposed project, and the impacts that might be expected to arise from the proposed work. Only black and white copies are used for evaluation and applicants are strongly recommended, therefore, not to use colour.

Part B of the proposal is uploaded by the applicant into the Electronic Proposal Submission Service (EPSS) described below.

***A maximum length may be specified for the different sections of Part B, or for Part B as a whole (see annex 4 of this Guide). Applicants must keep their proposal within***

<sup>2</sup> Charter of Fundamental Rights of the European Union, 2000/C 364/01. See also [http://www.europarl.europa.eu/charter/default\\_en.htm](http://www.europarl.europa.eu/charter/default_en.htm)

<sup>3</sup> Research relating to cancer treatment of the gonads can be financed.

*these limits. Even where no page limits are given, or where limits are only recommended, it is in the applicant's interest to keep the text concise since over-long proposals are rarely viewed in a positive light by the evaluating experts.*

### **Proposal language**

The working language of the expert evaluators is English and it is recommended that proposals are prepared in English. However, Proposals may be prepared in any official language of the European Union. If your proposal is not in English, the abstract in Part A of the proposal should be in English. A translation of the full proposal would be of assistance to the experts.

## **3.2. Proposal submission**

### **About the EPSS**

Proposals must be submitted electronically, using the Commission's **Electronic Proposal Submission Service (EPSS)**. Applicants can access the EPSS from <https://www.epss-fp7.org>. Proposals arriving at the Commission by any other means are regarded as 'not submitted', and will not be evaluated<sup>4</sup>.

All the data that applicants upload is securely stored on a server to which only applicants and the other participants in the proposal have access, until the deadline. This data is encrypted until the close of the call.

Full instructions will be found in the "EPSS preparation and submission guide" (see [http://cordis.europa.eu/fp7/epss\\_en.html](http://cordis.europa.eu/fp7/epss_en.html) ).

The most important points are explained below.

### **Use of the EPSS system by the proposal coordinator**

The EPSS refers to the participant who is taking the lead in the preparation of the proposal as the "proposal coordinator".

As coordinator you can:

- register as interested in submitting a proposal to a particular call
- complete all of Part A of the proposal, pertaining to the proposal in general, and to your own administrative details
- download the document template for writing Part B of the proposal, and when it is completed, upload the finished Part B
- submit the complete proposal Part A and Part B.
- define referees

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<sup>4</sup> In exceptional cases, when a proposal coordinator has absolutely no means of accessing the EPSS, and when it is impossible to arrange for another member of the consortium to do so, an applicant may request permission from the Commission to submit on paper. A request should be sent via the FP7 enquiry service (see annex 1), indicating in the subject line "Paper submission request". (You can telephone the enquiry service if web access is not possible: +800 6 7 8 9 10 11 from inside Europe; or +32 2 299 96 96 from anywhere in the world. A postal or email address will then be given to you). Such a request, which must clearly explain the circumstances of the case, must be received by the Commission no later than one month before the call deadline. The Commission will reply within five working days of receipt. If a derogation is granted, a proposal on paper may be submitted by mail, courier or hand delivery. The delivery address will be given in the derogation letter.

## **Submitting the proposal**

Only the coordinator is authorised to submit the proposal.

Completing the Part A forms in the EPSS and uploading a Part B does **not** mean that your proposal is submitted. Once there is a consolidated version of the proposal, the coordinator must press the button "SUBMIT NOW".

**(If you don't see the button "SUBMIT NOW", first select the "SUBMIT" tag at the top of the screen)**

**Please note that "SUBMIT NOW" starts the final steps for submission; it does not in itself cause the proposal to be submitted.**

After reading the information page that then appears, it is possible to submit the proposal using the button marked "*Press this button to submit the proposal*".

The EPSS then performs an automatic validation of the proposal. A list of any problems such as missing data, viruses, wrong file format or excessive file size will then appear on the screen. **Submission is blocked until these problems are corrected.** Once corrected, the coordinator must then repeat the above steps to achieve submission.

If successfully submitted, the coordinator receives a message that indicates that the proposal has been received. This automatic message is not the official acknowledgement of receipt (see Section 5).

The coordinator may continue to modify the proposal and submit revised versions overwriting the previous one right up until the deadline. The sequence above must be repeated each time.

If the submission sequence described above is not followed, the Commission considers that no proposal has been submitted.

The proposal Part B must be exclusively in PDF ("portable document format", compatible with Adobe version 3 or higher, with embedded fonts). Other file formats will not be accepted by the system.

## **About the deadline**

Proposals must be submitted before the deadline specified in the Call Fiche.

The EPSS will be closed for this call at the call deadline. After this time, access to the EPSS for this call will be impossible. Do not wait until the last moment before submitting your proposal!

**Call deadlines are absolutely final and are strictly enforced.**

Please note that applicants may submit successive drafts of their proposal through the EPSS. Each successive submission overwrites the previous version. It is a good idea to **submit a draft well before the deadline**.

*Leaving your first submission attempt to the last few minutes of the call will give you no time to overcome even the smallest technical difficulties, proposal verification problems or communications delays which may arise. Such events are never accepted as extenuating circumstances; your proposal will be regarded as not having been submitted.*

*Submission is deemed to occur at the moment when the proposal coordinator presses the "submit" button. It is not the point at which you start the upload. If you wait until too near to the close of the call to start uploading your proposal, there is a serious risk that you will not be able to submit in time.*

*If you have registered and submitted your proposal in error to another call which closes after this call, the Commission will not be aware of it until it is discovered among the downloaded proposals for the later call. It will therefore be classified as ineligible because of late arrival.*

*The submission of a proposal requires some knowledge of the EPSS system, a detailed knowledge of the contents of the proposal and the authority to make last-minute decisions on behalf of the consortium if problems arise.*  
**Applicants are advised not to delegate the job of submitting their proposal.**

In the unlikely event of a failure of the EPSS service due to breakdown of the Commission server during the last 24 hours of this call, the deadline will be extended by a further 24 hours. This will be notified by email to all proposal coordinators who had registered for this call by the time of the original deadline, and also by a notice on the Call page on CORDIS (see <http://cordis.europa.eu/fp7/calls>) or go to the "People" programme pages (see [http://cordis.europa.eu/fp7/people/home\\_en.html](http://cordis.europa.eu/fp7/people/home_en.html) and follow the "call" link) and on the web site of the EPSS.

Such a failure is a rare and exceptional event; therefore do not assume that there will be an extension to this call. If you have difficulty in submitting your proposal, you should not assume that it is because of a problem with the Commission server, since this is rarely the case. Contact the EPSS help desk if in doubt (see the address given in annex 1 of this Guide).

Please note that the Commission will not extend deadlines for system failures that are not its own responsibility. In all circumstances, applicants should aim to submit their proposal well before the deadline to have time to solve any problems.

**Correcting or revising your proposal**

Errors discovered in proposals submitted to the EPSS can be rectified by simply submitting a corrected version. So long as the call has not yet closed, the new submission will overwrite the old one.

Once the deadline has passed, however, the Commission can accept no further additions, corrections or re-submissions. The last eligible version of your proposal received before the deadline is the one which will be evaluated, and no later material can be submitted.



### **Ancillary material**

Only a single PDF file comprising the complete Part B can be uploaded. Unless specified in the call, any hyperlinks to other documents, embedded material, and any other documents (company brochures, supporting documentation, reports, audio, video, multimedia etc.) sent electronically or by post, will be disregarded.

### **Withdrawing a proposal**

Applicants may withdraw a proposal by submitting a revised version with an empty part B section, with the following words entered in the abstract field of form A:

***"The applicants wish to withdraw this proposal. It should not be evaluated by the Commission".***

## 4. Checklist

Of importance for the consortium in general, but in particular for the coordinator:

### 4.1. Preparing your proposal

- **Does your planned work fit with the call for proposals?** Check that your proposed work does indeed address the topics open in this call. (See the current version of the work programme).
- **Are you applying for the right funding scheme?** Check that your proposed work falls within the scope of this call, and that you have applied for one of the eligible funding schemes (see the work programme). If there is a choice, have you opted for the one that best suits your needs?. Check the Part A and Part B formats shown in annexes 3 and 4 to this Guide<sup>5</sup>
- **Is your proposal eligible?** The eligibility criteria are given in the work programme. See also annex 2 to this Guide. In particular, make sure that you satisfy the minimum requirements for the makeup of your consortium. Have any additional eligibility criteria been set for this call? Check that you comply with any budgetary limits that may have been fixed on the requested EU contribution. Any proposal not meeting the eligibility requirements will be considered ineligible and will not be evaluated.
- **Is your proposal complete?** Proposals must comprise a Part A, containing the administrative information including participant and project cost details on standard forms; and a Part B containing the scientific and technical description of your proposal as described in this Guide. A proposal that does not contain both parts will be considered ineligible and will not be evaluated.
- **Does your proposed work raise ethical issues?** Clearly indicate any potential ethical, safety or regulatory aspects of the proposed research and the way they will be dealt with in your proposed project. An ethical check will take place during the evaluation and an ethical review will take place for proposals dealing with sensitive issues. Proposals may be rejected on ethical grounds if such issues are not dealt with satisfactorily.
- **Does your proposal follow the required structure?** Proposals should be precise and concise, and must follow exactly the proposal structure described in this document (annex 4 to this Guide), which is designed to correspond to the evaluation criteria which will be applied. This structure varies for different funding schemes. Omitting requested information will almost certainly lead to lower scores and possible rejection.
- **Have you maximised your chances?** There will be strong competition. Therefore, edit your proposal tightly, strengthen or eliminate weak points. Put yourself in the place of an expert evaluator; refer to the evaluation criteria given in annex 2 to this Guide. Arrange for your draft to be evaluated by experienced colleagues; use their advice to improve it before submission.
- **Do you need further advice and support?** You are strongly advised to inform your National Contact Point of your intention to submit a proposal (see address in annex 1 to this Guide). Remember the Enquiry service listed in annex 1.

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<sup>5</sup> If you have in error registered for the wrong call or funding scheme, discard that registration (usernames and passwords) and register again before the call deadline. If, after the close of the call, you discover that you have submitted your proposal to the wrong call, notify the EPSS Helpdesk.

## **4.2. Final checks before submission**

- **Do you have the agreement** of all the members of the consortium to submit this proposal on their behalf?
  - **Is your Part B in portable document format (PDF)**, including no material in other formats?
  - **Is the filename made up of the letters A to Z, and numbers 0 to 9?** You should avoid special characters and spaces.
  - **Have you printed out your Part B**, to check that it really is the file you intend to submit, and that it is complete, printable and readable? After the call deadline it will not be possible to replace your Part B file.
  - **Is your Part B file within the size limit of 10 Mbytes?**
  - **Have you virus-checked your computer?** The EPSS will automatically block the submission of any file containing a virus.
- 
- **Have you made yourself familiar with the EPSS in good time?**
  - **Have you allowed time to submit a first version of your proposal well in advance of the deadline** (at least several days before), and then to continue to improve it with regular resubmissions?
  - **Have you completed the submission process for your latest version?**

## **4.3 Following submission**

- Information submitted to the EPSS remains encrypted until the deadline and can only be viewed by the applicant.
- It is recommended that you check that all your material has been successfully been uploaded **and** submitted.
- You can revise and resubmit your proposal up to call deadline.

## 5. What happens next

Shortly after the call deadline, the Commission will send an **acknowledgement of receipt** to the e-mail address of the proposal coordinator given in the submitted proposal. This is assumed to be the individual named on the A2 form for participant no. 1. Please note that the brief electronic message given by the EPSS system after each submission is not the official Acknowledgement of Receipt.

The sending of an acknowledgement of receipt does not imply that a proposal has been accepted as eligible for evaluation.

*If you have not received an acknowledgement of receipt within 12 working days after the call deadline, you should contact the FP7 Enquiry Service without further delay (see annex 1 of this Guide).*

The Commission will check that your **proposal** meets the **eligibility criteria** that apply to this call and funding scheme (see the Work Programme and section 2 of this Guide).

All eligible proposals will be evaluated by independent experts. The evaluation criteria and procedure are described in annex 2 of this Guide.

Soon after the completion of the evaluation, the results will be finalised and all co-ordinators will receive a letter containing **initial information** on the results of the evaluation, including the Evaluation Summary Report giving the opinion of the experts on their proposal. Even if the experts viewed your proposal favourably, the Commission cannot at this stage indicate if there is a possibility of EU funding.

The letter will also give the relevant contact details and the steps to follow if you consider that there has been a shortcoming in the conduct of the evaluation process.

The Commission also informs the relevant **programme committee**, consisting of delegates representing the governments of the Member States and Associated Countries. Based on the results of the evaluation by experts, the Commission draws up the final list of proposals for possible funding, taking account of the available budget. The Commission must also take account of the strategic objectives of the programme, as well as their overall balance.

Official letters are then sent to the applicants. If all has gone well, this letter will mark the beginning of a **negotiation** phase. Due to budget constraints, it is also possible that your proposal will be placed on a reserve list. In this case, negotiations will only begin if funds become available. In other cases, the letter will explain the reasons why the proposal cannot be funded on this occasion.

A description of the negotiation process will be provided in the "**FP7 Guidelines for negotiation**" (see [ftp://ftp.cordis.europa.eu/pub/fp7/docs/negotiation\\_en.pdf](ftp://ftp.cordis.europa.eu/pub/fp7/docs/negotiation_en.pdf))

Negotiations between the applicants and the Commission aim to conclude a grant agreement which provides for EU funding of the proposed work. They cover both the scientific/technological, and the administrative and financial aspects of the project. The officials conducting these negotiations on behalf of the Commission will be working within a predetermined budget envelope. They will also refer to any recommendations which the experts may have made concerning modifications to the work presented in the proposal. The negotiations will also deal with the relevant principles contained in the European Charter for Researchers and the Code of Conduct for their Recruitment.

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

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

Publication of call	<b>30 November 2007</b>
Deadline for submission of proposals	<b>28 March 2008, at 17:00:00 Brussels local time</b>
Evaluation of proposals	<b>May 2008</b>
Evaluation Summary Reports sent to proposal coordinators ("initial information letter")	<b>June 2008</b>
Invitation letter to successful coordinators to launch contract negotiations with Commission services	<b>July 2008</b>
Letter to unsuccessful applicants	<b>From July 2008</b>
Signature of first contracts	<b>From October 2008</b>

- Further information and help**

The CORDIS call page contains links to other sources that you may find useful in preparing and submitting your proposal. Direct links are also given where applicable.

### Call information

CORDIS call page and work programme <http://cordis.europa.eu/fp7/dc/index.cfm>  
Evaluation forms

### General sources of help:

The Commission's FP7 Enquiry service <http://ec.europa.eu/research/enquiries>

National Contact Points <http://cordis.europa.eu/fp7/ncp.htm>

National Contact Points in third countries [http://cordis.europa.eu/fp7/third-countries\\_en.html](http://cordis.europa.eu/fp7/third-countries_en.html)

## Specialised and technical assistance:

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

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

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

You may also wish to consult the following documents that can be found at  
[http://cordis.europa.eu/fp7/find-doc\\_en.html](http://cordis.europa.eu/fp7/find-doc_en.html)

## FP7 Legal basis documents generally applicable

- Decision on the Framework Programme
- Rules for Participation
- Specific Programmes
- Work Programmes

## Legal documents for implementation

- Rules for submission, evaluation, selection, award
- Standard model grant agreement
- Rules on verification of existence, legal status, operational and financial capacity

## Guidance documents

- Guidance Notes on Audit Certification Guide for beneficiaries Guide to Financial Issues
- Guide to IPR
- Checklist for the Consortium Agreement
- Negotiation Guidance Notes and Templates for Description of Work

## Other supporting information

- Brochure "The FP7 in Brief"
- European Charter for researchers and the Code of Conduct for their recruitment
- International cooperation
- Risk Sharing Financing Facility and the European Investment Bank

## Ethics Review

- Ethics check list
- Supporting documents

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

### 1. General

The evaluation of proposals is carried out on behalf of the Commission by independent experts.

Commission staff ensures that the process is fair, and in line with the principles contained in the Commission's rules<sup>6</sup>.

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

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

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

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

### 2. Before the evaluation

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

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

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

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<sup>6</sup> Rules on Proposal Submission, Evaluation, Selection and Award Procedures (to be posted on CORDIS)  
(Version 9 November 2007)

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

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

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

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

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

Commission staff, with the assistance of panel chairs, allocate proposals to individual experts, taking account of the fields of expertise of the experts, and avoiding conflicts of interest.

### 3. Individual evaluation of proposals

At the beginning of the evaluation, experts will be briefed by Commission staff, covering the evaluation procedure, the experts' responsibilities, the issues involved in the particular area/objective, and other relevant material (including the integration of the international cooperation dimension).

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

<b>IRSES Funding scheme: "International Research Staff Exchange Scheme".</b>			
<b>Quality of the Exchange Programme</b>	<b>Transfer of Knowledge</b>	<b>Implementation</b>	<b>Impact</b>
Objectives and relevance of the joint exchange programme	Quality and mutual benefit of the transfer of knowledge	Capacities (expertise/human resources/facilities/infrastructure) to achieve the objectives of the planned cooperation	Relevance of the proposed partnership to the area of collaboration and for the ERA
Scientific quality of the partners	Adequacy and role of staff exchanged with respect to the transfer of knowledge	Appropriateness of the plans for the overall management of the exchange programme	Potential to develop lasting collaboration with eligible Third Country partners.
Complementarities/synergies between the partners			

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



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

- 0 - The proposal fails to address the criterion under examination or cannot be judged due to missing or incomplete information*
- 1 - **Very poor.** The criterion is addressed in a cursory and unsatisfactory manner.*
- 2 - **Poor.** There are serious inherent weaknesses in relation to the criterion in question.*
- 3 - **Fair.** While the proposal broadly addresses the criterion, there are significant weaknesses that would need correcting.*
- 4 - **Good.** The proposal addresses the criterion well, although certain improvements are possible.*
- 5 - **Excellent.** The proposal successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor.*

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

Evaluation Criterion	Weighting (in %)	Threshold
Quality of the Exchange Programme	25	N/A
Transfer of Knowledge	30	3
Implementation	15	N/A
Impact	30	3

In addition to the thresholds for individual evaluation criteria, an overall threshold of 14 (out of a maximum possible score of 20) will be applied to the total weighted score.

Examples of the evaluation forms and reports that will be used by the experts in this call will be made available on CORDIS.

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

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

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

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

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

Scope of the call: It is possible that a proposal is found to be completely out of scope of the call during the course of the individual evaluation, and therefore not relevant. If an expert suspects that this may be the case, a Commission staff member will be informed immediately, and the views of the other experts will be sought.

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

#### **4. Consensus meeting**

Once all the experts to whom a proposal has been assigned have completed their IAR, the evaluation progresses to a consensus assessment, representing their common views.

This entails a consensus meeting to discuss the scores awarded and to prepare comments.

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

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

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

#### Ethical issues (above threshold proposals)

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

The EIR will be signed by a Commission moderator and one member of the consensus group (normally, the proposal rapporteur).

#### Outcome of consensus

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

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

The signing of the consensus report completes the consensus step.

## 5. Panel review

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

The tasks of the panel will also include:

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

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

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

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

The panel report is signed by at least three panel experts, including the panel rapporteur and the chairperson.

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

Proposals in this call must be submitted electronically, using the Commission's Electronic Proposal Submission System. The procedure is given in section 3 of this guide.

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

Section A1 gives a snapshot of your proposal, section A2 concerns the Host organisation, section, while section A4 deals with financial matters. There is no A3 form in this Action.

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

When you complete part A, please make sure that:

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

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

<b>Section A1 – Information on the Proposal</b>	
<b>Proposal number</b>	[pre-filled]
<b>Proposal Acronym</b>	Please provide a short title or acronym, which will be used to identify your proposal efficiently in this call. It should be of <u>no more than 20 characters</u> (use standard alphabet and numbers only; no symbols or special characters please). The same acronym should appear on each page of part B of your proposal.
<b>Proposal Title</b>	The title should be <u>no longer than 200 characters</u> and should be understandable to the non-specialist in your field.
<b>Marie Curie Action code</b>	This field will be pre-filled with the code corresponding to the action of the call: Networks for Initial Training ( <b>ITN</b> ) Industry-Academia Partnerships and Pathways ( <b>IAPP</b> ) Co-funding of Regional, National and International Programmes ( <b>COFUND</b> ) Intra-European Fellowships ( <b>IEF</b> ) European Re-integration Grants ( <b>ERG</b> ) International Outgoing Fellowships ( <b>IOF</b> ) International Incoming Fellowships ( <b>IIF</b> ) International Re-integration Grants ( <b>IRG</b> ) <b>International Research Staff Exchange Scheme (IRSES)</b> Researchers Night (NIGHT)
<b>Total Duration in months</b>	Insert the estimated duration of the project in full months.
<b>Call identifier</b>	[pre-filled] The call identifier is the reference number given in the call or part of the call you are addressing, as indicated in the publication of the call in the Official Journal of the European Union, and on the CORDIS call page. A call identifier looks like this: <i>FP7-PEOPLE-200X-IRSES</i>
<b>Abstract</b>	The abstract should, at a glance, provide the reader with a clear understanding of the objectives of the proposal, how they will be achieved, and their relevance to the Work Programme. This summary will be used as the short description of the proposal in the evaluation process and in communications to the programme management committees and other interested parties. It must therefore be short and precise and should not contain confidential information. Please use plain typed text, avoiding formulae and other special characters. <b>If the proposal is written in a language other than English, please write the proposal abstract in English.</b> There is <u>a limit of 2000 characters</u> .

<b>Section A2 – Information on Organisations:</b>	
<b>Participant number</b>	The number allocated to the participant for this proposal. In proposals with only one participant, the single participant is always number one. In proposals that have several participants, the co-ordinator of a proposal is always number one.
<b>Participant Identification Code</b>	The Participant Identification Code (PIC) will enable organisations to take advantage of the Unique Registration Facility. The allocation of PICs will be done progressively, starting with larger organisations. It is expected that the PIC field will be implemented in the EPSS during Spring 2008. An announcement will be made on CORDIS when this possibility becomes available. From then on, organisations who have received a PIC from the Commission are encouraged to use it when submitting proposals.
<b>Legal name</b>	<p><b>For Public Law Body,</b> it is the name under which your organisation is registered in the Resolution text, Law, Decree/Decision establishing the Public Entity, or in any other document established at the constitution of the Public Law Body;</p> <p><b>For Private Law Body,</b> it is the name under which your organisation is registered in the national Official Journal (or equivalent) or in the national company register.</p> <p><b>For a natural person,</b> it is for e.g. Mr Adam JOHNSON, Mrs Anna KUZARA, or Ms Alicia DUPONT</p>
<b>Organisation Short Name</b>	Choose an abbreviation of your Organisation Legal Name, only for use in this proposal and in all related documents. This short name should not be more <u>than 20 characters</u> exclusive of special characters (./;...), for e.g. CNRS and not C.N.R.S. It should be preferably the one as commonly used, for e.g. IBM and not Int.Bus.Mac.
<b>Legal address</b>	For Public and Private Law Bodies, it is the address of the entity's Head Office. For Natural Persons it is the Official Address. If your address is specified by an indicator of location other than a street name and number, please insert this instead under the "street name" field and "N/A" under the "number" field.
<b>Non-profit organisation</b>	Non-profit organisation is a legal entity qualified as such when it is recognised by national or international law.
<b>Public body</b>	Public body means any legal entity established as such by national law
<b>Research organisation</b>	Research organisation means a legal entity established as a non-profit organisation which carries out research or technological development as one of its main objectives.
<b>Higher or secondary education establishment</b>	A secondary and higher education establishment means organisations only or mainly established for higher education/training (e. g. universities, colleges ...).
<b>International organisation</b>	"international organisation" means an intergovernmental organisation, other than the European Community, which has legal personality under international public law, as well as any specialised agency set up by such an international organisation;
<b>International European Interest organisation</b>	"international European interest organisation" means an international organisation, the majority of whose members are Member States or Associated Countries, and whose principal objective is to promote scientific and technological cooperation in Europe;
<b>Joint Research Centre of the European Commission</b>	The European Commission's Joint Research Centre
<b>Entity composed of one or more legal entities</b>	European Economic Interest Groups, Joint Research Units (Unités Mixtes de Recherche), Enterprise Groupings Decision DL/2003/3188 27.11.2003

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

# Proposal Submission Forms



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

Marie Curie Actions  
**International Research Staff  
Exchange Scheme (IRSES)**

# A1

<i>Proposal Number</i>	<i>Proposal Acronym</i>
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## GENERAL INFORMATION ON THE PROPOSAL

<i>Proposal Title</i>			
<i>Marie Curie action-code</i>			
<i>Total duration in months</i>		<i>Call identifier</i>	
<i>Keywords (up to 200 characters)</i>			
<i>Abstract (up to 2000 characters)</i>			

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

<b>Does this proposal include any of the sensitive ethical issues detailed in the Research Ethical Issues table of Part B?</b>	<b>YES/NO</b>
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# Proposal Submission Forms



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

Marie Curie Actions  
**International Research Staff  
Exchange Scheme (IRSES)**

# A2

Proposal Nr	Proposal Acronym	Participant Nr
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## INFORMATION ON ORGANISATIONS

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

## Administrative data

Legal address	
Street name	Number
Town	
Postal Code / Cedex	
Country	
Internet homepage (optional)	

## Status of your organisation

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

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

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

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

# Proposal Submission Forms



EUROPEAN COMMISSION

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

Marie Curie Actions  
**International Research Staff  
Exchange Scheme (IRSES)**

# A2

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

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

## Contact points

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

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

# Proposal Submission Forms



EUROPEAN COMMISSION

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Research, Technological  
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Marie Curie Actions

**International Research Staff Exchange Scheme (IRSES)**

**A4**

<b>Proposal Number</b>		<b>Participant Number</b>		<b>Proposal Acronym</b>	
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## FUNDING REQUEST

Staff to be exchanged	Total Number of – researcher-months	Monthly subsistence allowance  (1,800 €, where applicable)	Requested EC contribution
<b>Name and country Partner 1</b>	Integer	Drop-down menu 0 or 1800 To be multiplied with A	= column A*B
<b>(to be expanded for each A2 form filled in)</b>			
<b>Total</b>	Sum		Sum

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

### Instructions for preparing proposal Part B for IRSES

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

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

The **maximum length** of part B is **20 pages** (excluding table of contents; the ethical issues section, start and end pages and, where applicable, annexes).

The font should correspond to Times New Roman size 12 pt with single line spacing and standard margins of 2 cm.

Please make sure that:

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

# **STARTPAGE**

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PART B

“PROPOSAL ACRONYM”

## Part B -Table of Contents

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

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

### **B 1 Quality of the Exchange Programme**

B 1.1 Objectives and relevance of the joint exchange programme

B 1.2 Scientific quality of the partners

B 1.3 Complementarities/synergies between the partners

### **B 2 Transfer of Knowledge**

B 2.1 Quality and mutual benefit of the transfer of knowledge

B 2.3 Adequacy and role of staff exchanged with respect to the transfer of knowledge

### **B 3 Implementation**

B 3.1 Capacities (expertise/human resources/facilities/infrastructure) to achieve the objectives of the planned cooperation

B 3.2 Appropriateness of the plans for the overall management of the exchange programme

### **B 4 Impact**

B 4.1 Relevance of the proposed partnership to the area of collaboration and for the ERA

B 4.2 Potential to develop lasting collaboration with the eligible Third Country partners.

Annex (if applicable)

Annex 1 Justification for Community contribution towards third country partner costs.

## **B 1 Quality of the Exchange Programme**

### B 1.1 Objectives and relevance of the joint research programme

- Describe the objectives of the joint research programme
- Give an overall description of the exchange scheme and the planned scientific activities
- Demonstrate that the numbers of exchanged staff and the duration of their exchange are adequate to achieve the objectives of the programme.

### B 1.2 Scientific quality of the partners

- Describe the expertise of the partners in the scientific fields of the cooperation and list their experience in international cooperation

### B 1.3 Complementarities/synergies between the partners

- Describe the complementarities and synergies between the partners

Illustrate how these complementarities and synergies will contribute to achieve the objectives of the programme

## **B 2 Transfer of Knowledge**

### B 2.1 Quality and mutual benefit of the transfer of knowledge

- Describe the programme for the transfer of knowledge between the partners. Please give detailed information about e.g. the number of workshops/conferences/training, the target audience, sustainability of the knowledge transfer, etc.
- Describe the added value (in terms of gained knowledge) for the partners involved

### B 2.3 Adequacy and role of staff exchanged with respect to the transfer of knowledge

- Describe the role of the exchanged researchers and their specific expertise. Define the goals to be achieved through their exchange
- If applicable: describe the reasons for exchanging managerial/technical staff and explain their specific role and the goals to be achieved through their exchange

## **B 3 Implementation**

### B 3.1 Capacities (expertise/human resources/facilities/infrastructure) to achieve the objectives of the planned cooperation

- Give a detailed description of the expertise and the human resources/facilities/infrastructure at the partner institutions

### B 3.2 Appropriateness of the plans for the overall management of the exchange programme

- Describe the management plan of the exchange scheme (e.g. support for detached and incoming personnel)
- Demonstrate that the complementarities and synergies between the partners are well exploited
-

## B 4 Impact

B 4.1 Relevance of the proposed partnership to the area of collaboration and for the European Research Area<sup>1</sup>

- Describe the partnership's contribution to the area of collaboration
- Describe the relevance of the exchange between the partner countries for ERA

B 4.2 Potential to develop lasting collaboration with the eligible Third Country partners

- Give a detailed overview over the measures taken to create or reinforce a lasting cooperation between the partners

### Annexes

Annex 1 Justification for Community contribution towards third country partner costs.

As far as ICPC countries and countries covered by the European Neighbourhood policy, are concerned, in specific and well justified cases, a Community contribution towards travel and subsistence for these partners may be envisaged. The justification should be presented here, with focus on the benefits of such for the collaboration.

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<sup>1</sup> Towards a European Research Area, version Brussels, 18 January 2000. COM (2000) 6



**ENDPAGE**

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PART B

“PROPOSAL ACRONYM”