

## **WORK PROGRAMME 2009**

### ***PEOPLE***

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

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

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

***Part I** describes the background to the WP and the broad policy objectives. **Part II** gives details of the 2009 Actions, while **Part III** gives the corresponding information, in overview form, of the relevant calls. The Annexes contain reference material. **Part IV** lists other activities not implemented through calls for proposals.*

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# I CONTEXT

## Objective:

The People Specific Programme<sup>1</sup> of the 7<sup>th</sup> Framework Programme (2007 to 2013) acknowledges that one of the main competitive edges in science and technology is the quantity and quality of its human resources. To support the further development and consolidation of the European Research Area (ERA), this Specific Programme's overall strategic objective is to make Europe more attractive for researchers. It 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. Built on the experiences of the Marie Curie actions under previous Framework Programmes, it is implemented through a coherent set of actions, particularly taking into account the European added value in terms of their structuring effect on the European Research Area. These actions address researchers at all stages of their careers, in the public and private sectors, from initial research training, specifically intended for researchers at the early stages of their career, to life-long learning and career development, as well as for knowledge transfer between sectors and with the rest of the world. Efforts will also be made to increase participation by women researchers, by encouraging equal opportunities in all Marie Curie actions, by designing the actions to ensure that researchers can achieve an appropriate work/life balance and by facilitating resuming a research career after a break.

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%

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

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

## **General introduction and approach for 2009**

The 2009 People work programme essentially represents a continuation and consolidation of the Marie Curie actions, after dynamic development in 2007 and 2008. However, a number of initiatives will be launched or reinforced in support of the actions to be proposed in the Commission Communication on the European researchers' partnership.

### ***Marie Curie actions – Continuity, consolidation and simplification***

As announced in the 2007 and 2008 work programmes, two new major actions have been launched in November 2007: Co-funding of National, Regional and International Programmes (COFUND) and the International Research Staff Exchange Scheme (IRSES). COFUND reinforces the Life-long Training and Career Development part of the People programme, and IRSES adds a strategic instrument to enhance the International Dimension by wider international cooperation between research organisations.

To raise further the visibility of Marie Curie international actions it is proposed to re-brand the international outgoing and incoming fellowships (IOF, IIF), as well as the IRSES scheme for short exchanges of research staff into an overall Marie Curie World Fellowships brand.

With this all the new elements foreseen in the Specific Programme legislation are in place. The development of these actions is aligned with the global multi-annual breakdown of budgetary resources set out above.

The 2008 work programme included calls for proposals for ITN and COFUND. There are no calls for this action in the 2009 work programme; however it is envisaged to publish calls for proposals (late 2009 for COFUND and early 2010 for ITN) subject to the adoption of the work programme 2010.

As a major amendment of past practice, the nationality rule, that excluded researchers from participating in training actions in their country of nationality, is now removed, leaving as the sole eligibility concept trans-national mobility.

Significant simplifications are also introduced, following certain administrative simplifications put in place in the work programme 2008. In particular, as an administrative simplification for individual fellowships, the maximum contributions for management costs and overheads are replaced by a fixed amount contribution. Also, to assure an improved budgetary management, the International and European reintegration grant calls are now regrouped under a single call.

The Researchers NIGHT action will be on Friday, 26 September, and will be the next occasion for a European wide public and media event for the promotion of research careers.

From a financial point of view, the 2008 strategy consisting of adapting the salary rates to the overall inflation, and of updating the country specific correction factors, will again be followed.

It is to be noted that grant agreements resulting from the 2009 work programme will be the first negotiated directly under the responsibility of the Research Executive Agency (+/- 1000 contracts), enabling the Commission to focus on the policy oriented measures.

### ***Strategic Policy Review***

The overall objective of the European researchers' partnership, proposed in 2008 as one of the ERA Green Paper follow-up actions, is to accelerate the realisation of a genuine European labour market for researchers, in a renewed partnership with and among Member States. National and European level actions in the framework of the partnership on key areas such as social security, open competitive recruitment, employment conditions, as well as training and skills development, would aim at facilitating brain circulation and improving career prospects for researchers at European level. The present work programme includes activities to support the implementation of the partnership.

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

In preparing this work programme, the Commission has taken into account advice from the 'People'<sup>3</sup> Advisory Group.

- **Terms used in this work programme**

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

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

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

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

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

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

- **Implementation principles**

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

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<sup>3</sup> [http://ec.europa.eu/research/fp7/advisory\\_en.html](http://ec.europa.eu/research/fp7/advisory_en.html).

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

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

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

The international dimension is addressed by actions aiming to strengthen and enrich international cooperation through researchers and to attract research talent to Europe. In addition to the Marie Curie World Fellowships, most of the other Marie Curie actions are open to *third country* researchers. Moreover, depending on the scheme, the participation of legal entities from *third countries* and of international organisations is foreseen under the conditions provided by the Rules for Participation<sup>4</sup> (for details see each relevant Action in part II).

The programme aims to ensure gender mainstreaming by encouraging equal opportunities in all Marie Curie actions and by benchmarking gender participation, with a view of achieving a broad balance over the period of the Framework Programme. The target of at least 40% participation by women set in earlier work programmes is maintained for 2009. The actions will be designed to ensure that researchers can achieve an appropriate work/life balance and will contribute to facilitate resuming a research career after a break. Although as a general rule fellowships are expected to be full-time, flexibility is possible for instance in terms of splitting a fellowship into more than one stay, or through part-time working, if justified and appropriate in the frame of the project implementation.

In the implementation of the Marie Curie actions, attention is also paid to the working conditions, transparency of recruitment processes, and career development as regards the researchers recruited on projects and programmes funded. For this the Commission Recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers<sup>5</sup> offers a reference framework, while respecting its voluntary nature.

Proposals covered by this work programme will, depending on the action, be submitted either by one or several organisations or by an individual researcher in liaison with a host organisation. In actions where an individual researcher in liaison with a host organisation can apply, the researcher cannot have more than one proposal in any individual action application procedure at any one time and cannot benefit, at the same time, from more than one Marie Curie action. For this particular purpose the application procedure is

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

<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.

deemed to have terminated for a proposal with the notification of its rejection, of it being placed on a reserve list, or of it being recommended for funding.

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

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

- **Distribution of the indicative budget**

For Intra-European Fellowships for career development (IEF), International Outgoing Fellowships for Career Development (IOF), International Incoming Fellowships (IIF) and Industry-Academia Pathways and Partnerships (IAPP), the distribution of the indicative budget of any given call over the scientific disciplines will be based on the number of eligible proposals received, which are allocated to one of eight scientific panels<sup>6</sup>.

For Reintegration Grants (RG) the distribution of the indicative budget of the call between the panel European Reintegration Grants (ERG) and the panel International Reintegration Grants (IRG) will be based on the requested Community contribution of the eligible proposals received.

For all calls where proposals are allocated to panels, if the budget allocated to one of the panels exceeds the requirements of all proposals positively evaluated<sup>7</sup> in that panel, the excess budget will be transferred to other panels following the above repartition mode. Equally, if the allocated funding to one panel is insufficient to fund the highest ranked proposal in that panel, necessary budget will be transferred from other panels in order to ensure that the highest ranked proposal can be funded.

There will be a single ranked list for each of the actions: International Research Staff Exchange Scheme (IRSES) and Researchers Night (NIGHT).

## **II CONTENT OF CALLS IN 2009**

In general, the 'People' Specific Programme is implemented through calls for proposals<sup>8</sup>. This work programme contains the calls for proposals published in 2008 and 2009 implemented with 2009 budget<sup>9</sup>. Where activities are implemented through other mechanisms than calls for proposals this is clearly stated in the relevant texts.

### **Activity 1: Initial Training of Researchers**

#### **1 MARIE CURIE ACTION: INITIAL TRAINING NETWORKS (ITN)**

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

<sup>7</sup> Measured as proposals having passed all relevant evaluation thresholds.

<sup>8</sup> Proposals for actions, which do not fall within the scope of a call for proposals, may be submitted to the Commission only when it is provided for in this work programme.

<sup>9</sup> Note that the call of COFUND was already part of the work programme 2008 and is not therefore covered in this work programme.

*There is no call in 2009. The intention is to adopt the 2010 work programme in mid-2009 and publish calls as early as possible thereafter.*

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

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

*Call Reference FP7-PEOPLE -2009-IEF*

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

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

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

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

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

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

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

**Eligible researchers:** The action addresses *experienced researchers* who are at a stage of their career when they can benefit from a life-long training and career development measure. This includes researchers with a more senior profile in terms of experience as well as those who wish to resume their research career after a break. On the date of the relevant deadline for submission of proposals, researchers addressed under this action are those defined as *experienced researchers*.

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

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

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

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

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

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

*Call References FP7-PEOPLE-2009-RG*

### **2.2.1 European Reintegration Grants (ERG)**

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

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

#### ***2.2.1.2 Technical content/scope***

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

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

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

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

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

**Eligible Researchers:** On the relevant cut-off date, researchers addressed under this action are those defined as *experienced researchers*.

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

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

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

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

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

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

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

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

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

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

Applications can be submitted continuously and will be evaluated and selected at regular intervals, based on cut-off dates, from the date of publication of the call. When a

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

proposal is submitted after the final cut-off date for the call it will be carried over to the first cut-off date of the appropriate subsequent call.

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

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

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

**Eligible researchers:** To be eligible, at the relevant cut-off date, researchers must be *experienced researchers*.

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

Applicants must comply with the rule for *mobility* at the relevant cut-off date.

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

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

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

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

*There is no call envisaged in the work programme 2009. A call launched under the 2008 work programme will close on 19<sup>th</sup> February 2009. A further call will be included in the 2010 work programme.*

## Activity 3: Industry-Academia Partnerships and Pathways

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

*Call Reference FP7-PEOPLE-2009-IAPP*

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

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

The action will be implemented through targeted and flexible support for human resources interactions within 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 non-commercial research institutions (e.g. universities/research centres) and one or more commercial enterprises, in particular SMEs, that propose a project based on a joint cooperation programme. Within this scheme, the commercial partners must be companies gaining the majority of their revenue through competitive means with exposure to commercial markets, and will include incubators, start-ups and spin-offs, venture capital companies, etc. The different participants should be from at least two different Member or Associated countries and there must be at least one participant from each of the two sectors. Above this minimum, the participation of *third countries* and of international organisations is possible under the conditions provided by the Rules for Participation<sup>11</sup>. 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 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

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<sup>11</sup> Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, page 1].

expected to exchange staff. Typically this exchange is in both directions, but there is flexibility.

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

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

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

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

Newly recruited staff from outside of the partnership must be *experienced researchers*, and must not have spent more than twelve months of the last three years in the country of the premises of the host organisation where they will carry out their project. They can be recruited for a period of between one and two years.

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

- Cost related to staff secondments between both sectors within the partnership;
- Costs related to the temporary hosting in either sector of *experienced researchers* recruited from outside the partnership;
- Networking costs and the organisation of workshops and conferences enhancing the inter-sector experience and knowledge exchange of both staff members from the participant organisations and researchers from outside the partnership;
- For participating SMEs only: costs related to small equipment expenses up to a maximum of 10% of the total Community contribution to the SME participant, if: (1) duly justified for the project, (2) on the basis of real cost and (3) on prior agreement by the Commission.

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

**Rules of mobility:**

The staff seconded has to be employed for at least 12 months prior to the secondment by the seconding institute.

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 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.

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

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

## **Activity 4: World Fellowships**

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

*Call Reference FP7-PEOPLE-2009-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 *third country* high-level research organisation. Subsequently, these researchers will return with the acquired knowledge and experience to an organisation in a Member State or Associated country.

#### ***4.1.2. Technical content/scope***

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

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

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

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

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

The researchers will be in a situation of secondment during the initial phase of training in the partner organisation in the *third country*.

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

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

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

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

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

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

*Call Reference FP7-PEOPLE-2009-IIF*

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

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

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

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

**Projects and participants:** The action provides financial support to individual research projects presented by the incoming *experienced researchers* in liaison with a legal entity (“host organisation”) in a Member State or an Associated country, as well as possibly a

“return host organisation” if the researcher’s country of origin is an International Cooperation Partner Country.

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

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

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

*Incoming Phase:*

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

*Possible Return Phase for researchers from ICPC countries:*

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

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

A grant agreement will be issued 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 the scientific costs relating to the researcher’s project at the return host.

**Eligible researchers:** To be eligible, at the deadline of submission, researchers must have been active in research in a *third country*. On the date of the relevant deadline for submission of proposals, researchers addressed under this action are those defined as *experienced researchers*. It is however expected that the researchers will typically have a more senior profile in terms of experience.

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

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

**4.2.3. Expected impact of the action**

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

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

*Call Reference FP7-PEOPLE-2009-IRSES*

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

The Marie Curie International Staff Exchange Scheme is a new type of action first implemented in 2008, that aims to strengthen research partnerships through staff exchanges and networking activities between European research organisations and organisations from countries with which the Community has an S&T agreement or are in the process of negotiating one<sup>12</sup>, and countries covered by the European Neighbourhood policy. Compared to existing Marie Curie actions, which provide mobility possibilities to individual researchers, this new action will provide support to research organisations to establish or reinforce long-term research cooperation through a coordinated joint programme of exchange of researchers for short periods.

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

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

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

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

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

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

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

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

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

#### **Community Contribution**

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

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<sup>12</sup> See ANNEX I to this work programme for countries eligible for the IRSES scheme.

The available Community funds will cover a subsistence allowance of the outgoing European researchers (including travel costs) of EUR 1 800/researcher/month<sup>13</sup>.

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

### **4.3.3 Expected impact**

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

## **Activity 5: Specific Actions**

### **5.1 MARIE CURIE ACTION: RESEARCHERS' NIGHT (NIGHT)**

*Call Reference FP7-PEOPLE-2009-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:** 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. The projects will be selected for funding by a panel of external independent experts. Preference should be given to those projects within which a regional, local or national financial involvement exists (without excluding those requesting 100% funding). Activities organised will have to be focused on the public at large, and be organised with researchers being actively involved and directly in contact with the public. Similar activities in Member states or Associated countries that comply with the aims of the NIGHT action may receive indirect support via promotional material.

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

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

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<sup>13</sup> *Third country* partner organisations may apply their own rates for their seconded staff.

The expected impact of this action consists of continuing to tackle the existing stereotypes about researchers and the profession, and to have the public at large better understand the central role of scientists and the key benefits they bring to society. The action should demonstrably reinforce trends which are already tangible through the increasing public participation in the Researchers' nights since the 2005 events. An additional impact should be to convince young people that scientific careers are fascinating and to stimulate them to embark on scientific careers with mobility.

## **5.2 SUPPORT FOR 'EURAXESS-SERVICES' NETWORK<sup>14</sup>**

### **Trans-national operation of the 'EURAXESS Services' Network**

*(FP7-PEOPLE-2009-EURAXESS)*

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

The objective of the action is to reinforce the EURAXESS Services Network (until its re-branding effective from June 2008 known as the European Network of Mobility Centres, ERA-MORE), by promoting trans-national co-operation. With a view to the quality and coherence of the services provided by the network, the action will focus on enhancing the overall performance of the Network and stimulating cooperation between the members on operational and strategic issues. This entails activities such as training sessions, joint workshops and promotion activities at European level, events for the benefit of trans-national audiences, follow up activities linked to the 'Charter and Code promoters' network, as well as activities to ensure a more full and systematic use of the European EURAXESS Jobs Portal and national Portals to enhance effectively open recruitment practices for researchers across Europe.

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

##### **Project and participants**

One single proposal will be financed under this call, in principle<sup>15</sup> involving one Bridgehead Organisation by participating country officially appointed by the relevant national authority. All other participants from the EU and Associated Countries are ineligible.

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

The grant will cover a period up to 18 months. The Community contribution rates for this action are based on the Coordination and Support Action (Coordinating Action) funding scheme and the evaluation criteria are set out in *Annex 2*.

#### ***Expected impact of the action***

The action is expected to deliver, in line with the objectives formulated in the European Researchers' partnership, further expanded and improved and sustained coverage of comprehensive, dependable and practical information services targeted to mobile researchers across the EU and Associated states, and improved effective connections at national level with a view to advertising all researchers' vacancies trans-nationally by 2010.

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<sup>14</sup> Related activities without being subject to a call for proposals can be found under point 4.2.1 Support for "EURAXESS-Services (former ERA-MORE Network)

<sup>15</sup> In case certain Bridgehead Organisations of the *EURAXESS Services* Network do not wish to participate this should be explicitly documented and duly motivated in the proposal (The EURAXESS Services Bridgehead Organisations (BHO) are nominated by the relevant ministry and act as coordinators at national level of the Network. The BHOs liaise with the European Commission, national governments and other organisations, they act also as link to the Steering Group for each country. The BHO is either a EURAXESS Service Centre itself or is closely related to one, providing expertise in matters falling under the scope of the EURAXESS Services Network)

# III IMPLEMENTATION OF CALLS

## THE 2009 MARIE CURIE ACTIONS ROADMAP

(Listed by closing dates)

Action	Call ID	Call Opens	Call Deadline/ Cut-off dates
NIGHT Researchers' Night	FP7-PEOPLE-2009-NIGHT	14 October 2008	<b>14 January 2009</b>
<i>Co-funding of Regional, National &amp; International Progs*</i>	<i>FP7-PEOPLE-COFUND-2008</i>	<i>19 November 2008</i>	<i>19 February 2009</i>
IRSES International Research Staff Exchange Scheme	FP7-PEOPLE-2009-IRSES	25 November 2008	<b>27 March 2009</b>
RG Reintegration Grants (ERG & IRG schemes) 1st cut off	FP7-PEOPLE-2009-RG	09 October 2008	<b>02 April 2009</b>
EURAXESS-Services Network	FP7-PEOPLE-2009-EURAXESS	22 January 2009	<b>22 April 2009</b>
IEF Intra-European Fellowships	FP7-PEOPLE-2009-IEF	18 March 2009	<b>18 August 2009</b>
IIF International Incoming Fellowships	FP7-PEOPLE-2009-IIF	18 March 2009	<b>18 August 2009</b>
IOF International Outgoing Fellowship	FP7-PEOPLE-2009-IOF	18 March 2009	<b>18 August 2009</b>
IAPP Industry Academia Partnerships & Pathways	FP7-PEOPLE-2009-IAPP	24 April 2009	<b>27 July 2009</b>
RG Reintegration Grants (ERG & IRG grants) 2nd cut off	FP7-PEOPLE-2009-RG	09 October 2008	<b>8 October 2009</b>

\*This call is covered by the work programme 2008.

### Activity 1: Initial Training of Researchers

#### 1.1 MARIE CURIE INITIAL TRAINING NETWORKS

*There is no call envisaged in this work programme. The intention is to adopt the work programme 2010 in mid-2009 and publish calls as early as possible thereafter.*

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

#### 2.1 MARIE CURIE INTRA-EUROPEAN FELLOWSHIPS FOR CAREER DEVELOPMENT

- **Call identifier:** *FP7-PEOPLE-2009-IEF*
- **Date of publication:** 18 March 2009<sup>16</sup>
- **Deadline:** 18 August 2009 at 17.00.00 Brussels local time<sup>17</sup>
- **Indicative budget:** *EUR 95 million* of the 2009 budget<sup>18</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:**

<sup>16</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>17</sup> At the time of the publication of the call, the Director-General responsible may delay this deadline by up to two months.

<sup>18</sup> Under the condition that the preliminary draft budget for 2009 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 criteria:**
  - This action addresses *experienced researchers* who must respect mobility conditions (see details in the core text of the work programme).
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in Annex 2 to this work programme
  - The evaluation shall follow a single-stage procedure.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.
  - Proposals are allocated to one of 8 scientific panels<sup>19</sup>. The distribution of the indicative budget of the call over the scientific disciplines will be based on 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>20</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 estimated to be available within some 4 months after the relevant deadline for submission.
  - Grant agreement signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.  
The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 to the People work programme.

## 2.2 MARIE CURIE RE-INTEGRATION GRANTS

- **Call identifier:** *FP7-PEOPLE-2009-RG*
- **Date of publication:** 09 October 2008<sup>16</sup>
- **Deadline:** Continuous submission with 'cut-off dates' for evaluation of proposals received until then on 2 April 2009 and 8 October 2009, for both dates at 17.00.00 Brussels local time<sup>17</sup>.
- **Indicative budget:** *EUR 31 million* of the 2009 budget<sup>18</sup> (of which approximately 1/2 for each evaluation round following the cut-off dates). The final budget

<sup>19</sup> The Marie Curie panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**.

<sup>20</sup> Measured as proposals having passed all relevant evaluation thresholds.

<sup>16</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>17</sup> At the time of the publication of the call, the Director-General responsible may delay this deadline by up to two months.

awarded to this call, following the evaluation, may vary up to 10% of the total value of this call.

• **Topics called:**

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

• **Eligibility criteria:**

- ERG: this action addresses *experienced researchers* (at the relevant cut off date). The researcher must be benefiting at the time of application or have previously benefited from a training and mobility action under the 7th or one of the previous Framework Programmes<sup>10</sup> of at least 18 months full-time equivalent. Applications will have to be submitted at the earliest one year before the end of the initial Marie Curie fellowship and not later than six months following its end.
- IRG: this action addresses *experienced researchers* who at the time of application must be nationals of a Member States or Associated country, and must at the date of submission have been active in research in a *third country* for at least 3 years. They must also respect mobility conditions (see details in the core text of the work programme).

• **Evaluation procedure:**

- Applications for ERG and IRG schemes will be treated in separate panels, and a ranked list created for each panel.
- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in Annex 2 to this work programme
- The evaluation shall follow a single-stage procedure.
- Proposals will not be evaluated anonymously.
- Proposals will be evaluated on a continuous basis and selected on an individual basis.
- Proposals may be evaluated remotely.
- The distribution of the indicative budget of the call between the panel ERG "European reintegration grants" and the panel IRG "International reintegration grants" will be based on the relative proportion of requested Community contribution of the eligible proposals received for each scheme. If the budget allocated to one of the panels exceeds the requirements of all proposals positively evaluated<sup>20</sup> in that panel, the excess budget will be transferred to the other panel. Equally, if the allocated funding to one panel is insufficient to fund the highest ranked proposal in that panel, necessary budget will be transferred from the other panel in order to ensure that the highest ranked proposal can be funded.

<sup>18</sup> Under the condition that the preliminary draft budget for 2009 is adopted without modification by the budgetary authority.

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

<sup>20</sup> Measured as proposals having passed all relevant evaluation thresholds.

- **Indicative evaluation and contractual timetable:**
  - Evaluation results estimated to be available within 4 months following relevant cut-off date.
  - Grant agreement signature: expected from 6 months after the relevant cut-off date.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement. The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of the People work programme.

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

*There is no call envisaged in this work programme. The intention is to adopt the work programme 2010 in mid-2009 and publish calls as early as possible thereafter.*

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

#### 1. MARIE CURIE INDUSTRY-ACADEMIA PARTNERSHIPS AND PATHWAYS

- **Call identifier:** *FP7-PEOPLE-2009-IAPP*
- **Date of publication:** 24 April 2009<sup>16</sup>
- **Deadline:** 27 July 2009 at 17.00.00 Brussels local time<sup>17</sup>
- **Indicative budget:** *EUR 65 million* of the 2009 budget<sup>18</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 Industry-Academia Partnerships and Pathways</i>	<i>Support for training and career development of researchers</i>

- **Eligibility criteria:**
  - This action addresses cooperation programmes between one or more non-commercial research institutions (e.g. universities/research centres) and one or more commercial enterprises from at least two different Member States or Associated countries.
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in Annex 2 to this work programme
  - The evaluation shall follow a single-stage procedure.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.

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<sup>16</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>17</sup> At the time of the publication of the call, the Director-General responsible may delay this deadline by up to two months.

<sup>18</sup> Under the condition that the preliminary draft budget for 2009 is adopted without modification by the budgetary authority.

- Proposals are allocated to one of 8 scientific panels<sup>19</sup>. The distribution of the indicative budget of the call over the scientific disciplines will be based on 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>20</sup> in that panel, the excess budget will be reallocated to the other panels based on the distribution as above. Equally, if the allocated funding to a panel is insufficient to fund the highest ranked proposal in that panel, the necessary budget will be transferred from the other panels based on the distribution as above, in order to ensure that the highest ranked proposal can be funded.
- **Indicative evaluation and contractual timetable:**
  - Evaluation results are estimated to be available 4 months after the relevant deadline for submission.
  - Grant agreement signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement  
The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of the People work programme.

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## Activity 4: World Fellowships

### 4.1 MARIE CURIE INTERNATIONAL OUTGOING FELLOWSHIPS FOR CAREER DEVELOPMENT

- **Call identifier:** *FP7-PEOPLE-2009-IOF*
- **Date of publication:** 18 March 2009<sup>16</sup>
- **Deadline:** 18 August 2009 at 17.00.00 Brussels local time<sup>17</sup>
- **Indicative budget:** *EUR 28 million* of the 2009 budget<sup>18</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

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

- **Eligibility criteria:**
  - This action addresses *experienced researchers*, who are nationals of a Member State or Associated country, who move from a Member State or Associated country to a third country and who respect the mobility conditions (see details in the core text of the work programme).
- **Evaluation procedure**

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<sup>19</sup> The Marie Curie panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**.

<sup>20</sup> Measured as proposals having passed all relevant evaluation thresholds.

<sup>16</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>17</sup> At the time of the publication of the call, the Director-General responsible may delay this deadline by up to two months.

<sup>18</sup> Under the condition that the preliminary draft budget for 2009 is adopted without modification by the budgetary authority.

- The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in Annex 2 to this work programme.
- The evaluation shall follow a single-stage procedure.
- Proposals will not be evaluated anonymously.
- Proposals may be evaluated remotely.
- Proposals are allocated to one of 8 scientific panels<sup>19</sup>. The distribution of the indicative budget of the call over the scientific disciplines will be based on 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>20</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 estimated to be available within some 4 months after the deadline for submission.
  - Grant agreement signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement. The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of the People work programme.

#### 4.2 MARIE CURIE INTERNATIONAL INCOMING FELLOWSHIPS

- **Call identifier:** *FP7-PEOPLE-2009-IIF*
- **Date of publication:** 18 March 2009<sup>16</sup>
- **Deadline:** 18 August 2009 at 17.00.00 Brussels local time<sup>17</sup>
- **Indicative budget:** *EUR 28 million* of the 2009 budget<sup>18</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

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

- **Eligibility criteria:**

<sup>19</sup> The Marie Curie panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**.

<sup>20</sup> Measured as proposals having passed all relevant evaluation thresholds.

<sup>16</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>17</sup> At the time of the publication of the call, the Director-General responsible may delay this deadline by up to two months.

<sup>18</sup> Under the condition that the preliminary draft budget for 2009 is adopted without modification by the budgetary authority.

- This action addresses *experienced researchers* who move from a third country to Member State or Associated country and who respect the mobility conditions (see details in the core text of the work programme).
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in Annex 2 to this work programme
  - The evaluation shall follow a single-stage procedure.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.
  - Proposals are allocated to one of 8 scientific panels<sup>19</sup>. The distribution of the indicative budget of the call over the scientific disciplines will be based on 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>20</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 estimated to be available within some 4 months after the deadline for submission.
  - Grant agreement signature: expected from within 6 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.  
The forms of grants and maximum reimbursement rates which will be offered are specified in Annex 3 of the People work programme.

#### 4.3 MARIE CURIE INTERNATIONAL RESEARCH STAFF EXCHANGE SCHEME

- **Call identifier:** *FP7-PEOPLE-2009-IRSES*
- **Date of publication:** 25 November 2008<sup>16</sup>
- **Deadline:** 27 March 2009 at 17.00.00 Brussels local time<sup>17</sup>
- **Indicative budget:** *EUR 30 million* of the 2009 budget<sup>18</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

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

<sup>19</sup> The Marie Curie panels are: Chemistry **CHE**, Social and Human Sciences **SOC**, Economic Sciences **ECO**, Information Science and Engineering **ENG**, Environment and Geosciences **ENV**, Life Sciences **LIF**, Mathematics **MAT**, Physics **PHY**.

<sup>20</sup> Measured as proposals having passed all relevant evaluation thresholds.

<sup>16</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>17</sup> At the time of the publication of the call, the Director-General responsible may delay this deadline by up to two months.

<sup>18</sup> Under the condition that the preliminary draft budget for 2009 is adopted without modification by the budgetary authority.

<i>Staff Exchange Scheme</i>	<i>researchers</i>
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- **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 organisations either located in countries with which the Community has an S&T agreement or are in the process of negotiations, or in countries covered by the European Neighbourhood Policy.
- **Evaluation procedure**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in Annex 2 to this work programme.
  - The evaluation shall follow a single-stage procedure.
  - Proposals will not be evaluated anonymously.
  - Proposals may be evaluated remotely.
  - There will be a single ranking list.
- **Indicative evaluation and contractual timetable:**
  - Evaluation results estimated to be available within some 6 months after the deadline for submission.
  - Grant agreement signature: expected from within 9 months after the relevant deadline for submission.
- **Consortia agreements:** Participants in actions resulting from this call are required to conclude a consortium agreement.  
The forms of grant and the maximum reimbursement rates which will be offered are specified in the core text (II.4.3) of the People work programme.

## Activity 5: Specific Actions

### 5.1 MARIE CURIE RESEARCHERS' NIGHT

- **Call identifier:** *FP7-PEOPLE-2009-NIGHT*
- **Date of publication:** 14 October 2008<sup>16</sup>
- **Deadline:** 14 January 2009 at 17.00.00 Brussels local time<sup>17</sup>
- **Indicative budget:** *EUR 3 million* of the 2009 budget<sup>18</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

ACTION	Funding Schemes
<i>Researchers' Night 2009</i>	<i>Coordination and support actions (support)</i>

<sup>16</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>17</sup> At the time of the publication of the call, the Director-General responsible may delay this deadline by up to two months.

<sup>18</sup> Under the condition that the preliminary draft budget for 2009 is adopted without modification by the budgetary authority.

- **Eligibility criteria:**
  - This action addresses any legal entity or partnership of entities in the Member States and Associated countries.
- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in Annex 2 to this work programme.
  - The evaluation shall follow a single-stage procedure.
  - Proposals will not be evaluated anonymously.
  - Proposals will be selected on an individual basis.
  - Proposals may be evaluated remotely.
  - There will be a single ranking list.
- **Indicative evaluation and contractual timetable:**
  - Evaluation results estimated to be available within 1 month following the deadline for submission.
  - 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. The form of grants that will be offered are specified in Annex 3.1 of the People work programme.

## 5.2 TRANS-NATIONAL OPERATION OF THE EURAXESS SERVICES NETWORK

- **Call identifier:** *FP7-PEOPLE-2009-EURAXESS*
- **Date of publication:** 22 January 2009<sup>16</sup>
- **Deadline:** 22 April 2009 at 17.00.00 Brussels local time<sup>17</sup>
- **Indicative budget:** *EUR 2.9 million* of the 2009 budget<sup>18</sup>. The final budget awarded to this call, following the evaluation of projects, may vary up to 10% of the total value of this call.
- **Topics called:**

ACTION	Funding Schemes
<i>EURAXESS Services Network 2009</i>	<i>Coordination and Support Actions (Coordinating Action)</i>

- **Eligibility criteria:**
  - This action addresses one single proposal, in principle<sup>15</sup> involving one Bridgehead Organisation by participating country officially appointed by the

<sup>16</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>17</sup> At the time of the publication of the call, the Director-General responsible may delay this deadline by up to two months.

<sup>18</sup> Under the condition that the preliminary draft budget for 2009 is adopted without modification by the budgetary authority.

<sup>15</sup> In case certain Bridgehead Organisations of the *EURAXESS Services Network* do not wish to participate this should be explicitly documented and duly motivated in the proposal (The *EURAXESS Services Bridgehead Organisations (BHO)* are nominated by the relevant ministry and act as coordinators at national level of the Network. The BHOs liaise with the European Commission, national governments and other organisations, they act also as link to the Steering Group for each country. The BHO is either a *EURAXESS Service Centre* itself or is closely related to one, providing expertise in matters falling under the scope of the *EURAXESS Services Network*).

relevant national authority. All other participants from the EU and Associated Countries are ineligible.

- **Evaluation procedure:**
  - The evaluation criteria (including weights and thresholds) and sub-criteria together with the eligibility, selection and award criteria, for the different funding schemes are set out in annex 2 to this work programme.
  - The evaluation shall follow a single evaluation following a single proposal submission.
  - Proposals will not be evaluated anonymously.
  - Proposals will be selected on an individual basis.
  - Proposals may be evaluated remotely.
  - There will be a single ranking list.
- **Indicative evaluation and contractual timetable:**
  - Evaluation results estimated to be available within 1 month following the deadline for submission.
  - Grant agreement signature: expected within 6 months after the deadline for submission.
  - A grant agreement shall be awarded for up to 18 months.
- **Consortia agreements:** Participants in actions resulting from this call are not required to conclude a consortium agreement.
- **Particular requirements for participation, evaluation and implementation:**
  - The number of participants for consortia resulting from this call must include one Bridgehead Organisation by participating country officially appointed by the relevant national authority<sup>21</sup>.
  - The Commission will finance one single proposal under this call.
  - The form of grants that will be offered are specified in Annex 3.1 of the People work programme

## IV OTHER ACTIVITIES FOR 2009

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

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<sup>21</sup> In case certain Bridgehead Organisations of the *EURAXESS Services* Network (formally known as ERA-MORE Networks) do not wish to participate, this should be explicitly documented in the proposal.

<sup>22</sup> Based a framework contracts under Article 88 of the Financial Regulation and Article 117 of the Implementing Rules; or by a grant to an identified beneficiary in the sense of Article 14(a) of the FP7 Rules for Participation (Regulation of the European Parliament and of the Council laying down the rules for the participation of undertakings, research centres and universities in actions under the 7th Framework Programme and for the dissemination of research results (2007-2013) [Regulation N° 1906/2006/EC of 18.12.2006, OJ L 391 of 30.12.2006, page 1]).

The work programme 2009 needs to contain policy support for the implementation of the four axes of the Communication (May 2008) "Researchers Partnership " in areas such as dedicated information services for researchers, communication campaigns, as well as evaluation and monitoring<sup>23</sup>.

The measures to implement the activities will include:

**4.1. Support for a monitoring system** on national policies on human resources in research and on their effects at the level of research organisations, including the development and use of mobility and career indicators and data collection.

#### Objectives

Improved knowledge of policy developments and their effect and improved knowledge base for future policy developments (*guidelines, good practices*).

#### Implementation

Through a call for tender for a project (indicative budget EUR 2 000 000) with a duration of up to three years with annual progress reports; indicatively three service contracts; procedure to be conducted in the first half of 2009.

Funding scheme: Coordination and support action - public procurement.

#### **4.2 Support for EURAXESS-Researchers in Motion Activities<sup>24</sup>**

A number of activities covered under the activity heading 'Specific Actions' and of the scientific diasporas activity under the activity heading 'International dimension' will be regrouped and rebranded from June 2008 onwards under the common name of "EURAXESS – Researchers in motion". As part of this exercise the ERA-MORE Network has become the EURAXESS Services Network; the European Researcher's Mobility Portal has become the EURAXESS Jobs Portal; the activities to support the implementation of the European Charter for Researchers and Code of Conduct for their Recruitment have become the EURAXESS Rights activity; and ERA-LINK and NERE-LINK are regrouped under the EURAXESS Links (*Abroad* and *In Europe* respectively) activity.

##### **4.2.1. EURAXESS Services Network**

#### Objectives

To further expand the geographic coverage of the *EURAXESS Services Network*, to improve its visibility, to raise further the awareness of all *EURAXESS* activities (*Services, Jobs, Rights and Links*) and to support animation activities in that frame.

#### Implementation

Amounting to a total of EUR 1 350 000, the following activities will be implemented<sup>25</sup>:

- To include three countries in the *EURAXESS Services Network* that were so far not eligible for this activity a grant for a duration of up to 3 years would be awarded to

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<sup>23</sup> Following the recommendations of an external study carried out by Deloitte/TEP, all activities for researchers will be overarched by a new and unique one logo as of June 2008. They will be called **EURAXESS - Researchers in Motion ("Services"** to indicate the ERA-MORE Network; **"Jobs" to indicate** the European Researcher's Mobility Portal; **"Links"** to indicate ERA and NERE-Link, and **"Rights"** to indicate the European Charter and Code.

<sup>24</sup> Activities under 4.2.1, 4.2.2, and 4.2.3 are linked to Activity Heading 5 ("Specific actions" of the Specific programme "People", while 4.2.4 is linked to Activity Heading 4 ("International dimension") of this Specific programme.

<sup>25</sup> In addition, the call for proposals "Trans-national operation of the *EURAXESS-Services Network*" will be published on 22 January 2009 (see II Activity 5, par. 5.2).

identified beneficiaries in the sense of the Rules for Participation in the 7<sup>th</sup> Framework Programme<sup>26</sup>, i.e. the ministries responsible for research, or legal entities officially designated by these ministries, of Albania, Bosnia-Herzegovina<sup>27</sup> and Montenegro. The Commission contribution by way of support action of EUR 200 000 per country will serve to contribute to the start-up phase of the organisation and operation of *EURAXESS* Centres at national level (total budget EUR 600 000; first half of 2009).

Funding scheme: Coordination and support action - named beneficiaries.

- To improve the visibility of the *EURAXESS Services* Network and raising the awareness, as well as providing animation for all *EURAXESS* activities (*Services, Jobs, Rights, Links*), implemented under framework contracts for projects of one year duration (total indicative budget EUR 750 000); indicatively two to four service contracts; procedures normally to be conducted in both the first and second half of 2009.

Funding scheme: Coordination and support action – public procurements.

#### **4.2.2 EURAXESS Jobs Portal**

##### Objectives

To expand the capacity and ease of use of the *EURAXESS Jobs* Portal and to ensure its effective links with national Portals through technical maintenance and further architectural developments, in particular with a view to set up an advanced infrastructure to accommodate the advertisement across Europe and globally of all European researchers' vacancies by 2010.

##### Implementation

Maintenance and infrastructure developments implemented under framework contracts for projects of one year duration (total indicative budget EUR 500 000); indicatively two service contracts, procedures normally to be conducted in the first half of 2009.

Funding scheme: Coordination and support action - public procurement.

#### **4.2.3 EURAXESS Rights**

##### Objectives

- Support to the effective implementation of the principles contained in the Commission Recommendation on the European Charter for Researchers and Code of Conduct for their Recruitment<sup>28</sup> on a voluntary basis through the exchange of good practices and development of further guidelines in that frame, as well as the 'roll-out' of a Charter and Code label mechanism system as a recognition for organisation supporting and implementing the Charter and Code-principles.

-To raise awareness and promote the implementation of the Scientific Visa Directive and Recommendations, as well as map its effects.

##### Implementation

- Charter and Code label mechanism: developing a handbook with any relevant information, templates for action plans and examples on how to implement the Charter

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<sup>26</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>27</sup> Conditional upon the signature by Bosnia-Herzegovina of an Association Agreement with the Communities' 7<sup>th</sup> Framework Programme for Research and Technological Development.

<sup>28</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.

and Code and setting up of working groups to deepen Charter and Code issues, exchange of good practices, implemented through framework contracts; coordination and support action – expert contracts; indicatively one or two service contracts; procedures normally to be conducted in the first half of 2009. (indicative budget EUR 250 000)

Funding scheme: Coordination and support action - public procurement and experts<sup>29</sup>

- Scientific Visa: publication on-line and in print of information material (case studies, best practices, obstacles and possible solutions) and an associated promotion campaign to be implemented through framework contracts (indicative budget EUR 150 000); indicatively one to two service contracts; procedures normally to be conducted in the first half of 2009.

Funding scheme: Coordination and support action - public procurement.

#### **4.2.4 EURAXESS Links**

##### Objectives

- To promote further the existing networks of European researchers abroad (*EURAXESS Links - Abroad*) whilst expanding it to other countries and regions in the world.
- To set up the networking of foreign researchers in Europe from one country/region (*EURAXESS Links - In Europe*).

Both initiatives will provide researchers with information and keep them in touch with developments in European research policies and activities, while in the case of the networking of foreign researchers in Europe information about developments and opportunities for cooperation with the home region/country of the researchers concerned will be included.

##### Implementation

Within the indicative budgetary outline below the activities will be implemented in the context of framework contracts for projects of a duration of around one year, with between two and four service contracts foreseen, the procedures for which are to be conducted in the first half of 2009

- *EURAXESS Links - Abroad:*

- Continuation of activities already launched in the USA, Japan and China):  
EUR 400 000
- Enlarging the geographical coverage:  
EUR 200 000

- *EURAXESS Links - In Europe:*

- Launch of initiative in one country/region: EUR 300 000
- Setting up, maintenance of dedicated website, and promotion: EUR 300 000

Funding scheme: Coordination and support action - public procurement.

**In addition** to the above activities,

The Commission will appoint independent experts to assist with the evaluation of proposals in accordance with article 17 of the Rules for Participation. In addition independent experts will be appointed to assist the Commission and the participants to

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<sup>29</sup> In accordance with Article 14(c), 17 and 27 (5) of Regulation (EC) No 1906/2006 of 18 December 2006 laying down the rules for the participation of undertakings, research centres and universities in actions under the Seventh Framework Programme and for the dissemination of research results (2007-2013).

indirect actions financed under FP7 and previous framework programmes with the review of running actions.

Funding scheme: Coordination and support action - experts<sup>30</sup>.

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<sup>30</sup> In accordance with Article 14(c), 17 and 27 (1) and (5) of Regulation (EC) No 1906/2006 of 18 December 2006 laying down the rules for the participation of undertakings, research centres and universities in actions under the Seventh Framework Programme and for the dissemination of research results (2007-2013).

**SUMMARY – 2009 BUDGET1. Activities included in the 2008 work programme, drawing on the 2009 budget**

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

**2. Activities included in the 2009 work programme with 2009 budget**

<b>Actions subject to calls for proposals</b>	<b>Budget 2009<sup>31</sup> (EUR million)</b>
<b>2. Life-long Training and Career Development</b>	
Intra-European Fellowships for Career Development (IEF)	95
<u>Re-Integration Grants</u>	
European Re-integration grants (ERG)	31
International Re-integration grants (IRG)	
<b>3. Industry-Academia Partnerships and Pathways</b>	
Industry-Academia Partnerships and Pathways (IAPP)	65
<b>4. World Fellowships</b>	
International Outgoing Fellowships for Career Development (IOF)	28
International Incoming Fellowships (IIF)	28
International Research Staff Exchange Scheme (IRSES)	30
<b>5. Specific actions</b>	
Researchers' Night (NIGHT)	3
EURAXESS-Services Network (EURAXESS)	2.9
<b>Subtotal</b>	<b>282.9</b>
<b>Actions not subject to open calls for proposals</b>	<b>5.45</b>
<b>Expert and Reviewer Evaluators</b>	<b>6.75</b>
<b>Total</b>	<b>295.10</b>

\*

**3. All activities with 2009 budget (EUR million)**

Actions subject to calls for proposals	<b>502.9</b>
Actions not subject to open calls for proposals	<b>5.45</b>
Expert and Reviewer Evaluators	<b>6.75</b>
<b>Total</b>	<b>515.1</b>

**Actions not subject to open calls for proposals**

<b>Actions not subject to open calls for proposals</b>	<b>Budget 2009<sup>31</sup> (EUR million)</b>
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<sup>31</sup> Under the condition that the preliminary draft budget for 2009 is adopted without modification by the budgetary authority.

<sup>31</sup> Under the condition that the preliminary draft budget for 2009 is adopted without modification by the budgetary authority.

Support for a monitoring system on national policies on HR in research	2
Support for "EURAXESS-Researchers in motion" Activities	
EURAXESS-Services	
- Enlarging the geographical coverage of services	0.6
- Awareness of EURAXES activities	0.75
EURAXESS-Jobs	0.5
EURAXESS-Rights-	
- Rights label and impact assessment	0.25
- Visa	0.15
EURAXESS-Links	
- Abroad	0.6
- In Europe	0.6
<b>Total</b>	<b>5.45</b>

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

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

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

## V INDICATIVE PRIORITIES FOR FUTURE CALLS

In principle, 2010 will see a continuation of the main Marie Curie actions of 2009. At this stage no new Marie Curie actions are envisaged.

# ANNEXES

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

### List of

### International Co-operation Partner Countries (ICPC)<sup>1</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>2</sup>	UM
• Sudan	L
• Swaziland	LM
• Tanzania	L
• Togo	L

Uganda	L
Zambia	L
Zimbabwe	L
<b><u>- CARIBBEAN</u></b>	
• 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
<b><u>- PACIFIC</u></b>	
• Cook Islands	UM
• Timor Leste	L
• Fiji	LM
• Kiribati	LM
• Marshall Islands	LM
• Micronesia, Federal States of	LM
• Nauru	UM
• Niue	UM
• Palau	UM
• Papua New Guinea	L
• Samoa	LM
• Solomon Islands	L
• Tonga	LM
• Tuvalu	LM
• Vanuatu	LM
<b><u>ASIA</u></b>	
• Afghanistan	L
• Bangladesh	L
• Bhutan	L
• Burma/Myanmar	L
• Cambodia	L
• China <sup>2**</sup>	LM
• Democratic People's Republic of Korea	L
• India <sup>2**</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
<b><u>EASTERN EUROPE AND CENTRAL ASIA (EECA)</u></b>	
• Armenia <sup>3</sup>	LM
• Azerbaijan <sup>3</sup>	LM
• Belarus <sup>3</sup>	LM
• Georgia <sup>3</sup>	LM
• Kazakhstan	LM
• Kyrgyz Republic	L
• Moldova <sup>3</sup>	LM
• Russia <sup>2**</sup>	UM
• Tajikistan	L
• Turkmenistan	LM
• Ukraine <sup>2,3</sup>	LM
• Uzbekistan	L
<b><u>LATIN AMERICA</u></b>	
• Argentina <sup>2</sup>	UM
• Bolivia	LM
• Brazil <sup>2**</sup>	LM
• Chile <sup>2</sup>	UM
• Colombia	LM
• Costa Rica	UM
• Ecuador	LM
• El Salvador	LM
• Guatemala	LM
• Honduras	LM
• Mexico <sup>2</sup>	UM
• Nicaragua	LM
• Panama	UM
• Paraguay	LM
• Peru	LM
• Uruguay	UM
• Venezuela	UM
<b><u>MEDITERRANEAN PARTNER COUNTRIES (MPC)</u></b>	
• Algeria <sup>3</sup>	LM
• Egypt <sup>2,3</sup>	LM
• Jordan <sup>3</sup>	LM
• Lebanon <sup>3</sup>	UM
• Libya <sup>3</sup>	UM

• Morocco <sup>2,3</sup>	LM
• Palestinian-administered areas <sup>3</sup>	LM
• Syrian Arab Rep. <sup>3</sup>	LM
• Tunisia <sup>2,3</sup>	LM
<b><u>WESTERN BALKAN COUNTRIES (WBC)</u></b>	
• Bosnia-Herzegovina <sup>4</sup>	LM
• Kosovo <sup>5</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.

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

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

<sup>2</sup> Signed an agreement with the EC covering Science & Technology.

<sup>3</sup> These countries are also part of the European Neighbourhood Policy (ENP).

<sup>4</sup> Until the country becomes Associated to FP7

<sup>5</sup> As defined by UNSC resolution 1244 of 10 June 1999.

## **Annex 1.2 Countries eligible for the International Research Staff Exchange Scheme (IRSES)<sup>32</sup>**

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

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

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

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

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<sup>32</sup> and which are not Associated countries for the purpose of the FP7

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

### **Eligibility criteria**

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

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

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

### **Evaluation criteria**

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

- scientific and/or technological excellence;
- relevance to the objectives of these Specific Programmes <sup>33</sup>;
- the potential impact through the development, dissemination and use of project results;
- the quality and efficiency of the implementation and management.

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

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

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

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

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

Notes:

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

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<sup>33</sup> Relevance: A proposal may be partially relevant if it addresses only marginally the topic(s) of the call, or if only part of the proposal addresses them. Such conditions will be reflected in the evaluation of the first criterion ('S/T excellence'). The degree to which a proposal is relevant to the objectives of a call will be reflected in the evaluation of the third criterion ('impact'). Proposals that are clearly not relevant to a call ('out of scope') will be rejected on eligibility grounds before the evaluation.

3. In the following tables, the fourth column, for the funding scheme **Support for Training and Career Development of Researchers**, and the second column, for the funding scheme **Coordination and Support Actions**, corresponds to the **selection criteria** in the meaning of Article 115 of the Financial Regulation<sup>34</sup> and its implementing rules<sup>35</sup>. They will also be the basis for assessing the operational capacity of participants. The other criteria correspond to the **award criteria**.

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<sup>34</sup> Council Regulation No 1605/2002 of 25 June 2002 on the Financial Regulation applicable to the general budget of the European Communities, OJ L 248 16.09.2002, p.1.

<sup>35</sup> Commission Regulation No 2342/2002 of 23 December 2002 laying down detailed rules for the implementation of Council Regulation No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities, OJ L 357 31.12.2002, p. 1.

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

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

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

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

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

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

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

<b>S&amp;T Quality (award)</b> Threshold 3, Weighting:25%	<b>Transfer of knowledge (award)</b> Threshold 3, Weighting:20%	<b>Researcher (award) N/A</b>	<b>Implementation (selection)</b> Threshold 3, Weighting:25%	<b>Impact (award)</b> Weighting:30%
<b>Priority in case of ex aequo</b> <b>1</b>	<b>3</b>		<b>2</b>	<b>4</b>
S&T objectives of the research programme, including in terms of intersectoral issues.	Quality of the transfer of knowledge programme. Consistency with the research programme.		Capacities (expertise / human resources/ facilities / infrastructures) to achieve the research and exchange of know-how and experience. Fit between capacity of host and size of support requested.	Provision to develop new intersectoral and lasting collaboration
Scientific quality of the joint collaborative research programme.	Importance of the transfer of knowledge in terms of intersectoral issues.		Adequate exploitation of complementarities and synergies among partners in terms of transfer of knowledge.	Strategy for the dissemination and facilitation of sharing of knowledge and culture between the participants and external researchers (including international conferences, workshops, training events).
Appropriateness of the research methodology.	Adequacy of the role of researchers exchanged and recruited from outside the partnership with respect to the transfer of knowledge programme.		Appropriateness of management plans (recruitment strategy, IPR strategy, demarcation of responsibilities, rules for decision making, etc).	Extent to which SMEs contribute to the project.
Originality and innovative aspect of the research programme. Knowledge of the state-of-the-art.			How essential is non-ICPC Third Country participation, if any, to the objectives of the research training programme.	In case of SMEs participation: Adequacy of the available infrastructures for the performance of the project. In case extra equipment is requested, necessity and justification in the context of the partnership.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

As to parental benefits it has to be noted that, even if such a category does not fall within the minimum required social security coverage requested by the Commission, the Commission can decide, on request by the researchers and the host organisation, to augment the sum of the Community contribution as a consequence. This is the adequate social security coverage provided, at any place of the implementation of the project, by the host institution when a researcher is not recruited under the social security scheme applied to employees in its country. Only compulsory and non-recoverable costs under the applicable national law are reimbursed by the Commission, under request and submission of pertinent documents together with the final reports at the end of the project. Calculated on a monthly basis, the contribution shall not exceed the difference between the compensation received from the national social insurance regime and the amount of the Community contribution mentioned in Table 3.1.

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

maintained by the researcher. This allocation, as well as the travel allowance, will only be due for researchers doing a trans-national mobility.

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

**Table 3.1: Reference rates for monthly living allowances (cost of living index 100)<sup>36</sup>**

Researchers Categories	A (EUR/year)	B (EUR/year)
Early-stage researchers	35 300	17 650
Experienced researchers (4-10 years experience)	54 300	27 150
Experienced researchers (>10 years experience)	81 400	40 700

This amount represents an increase of roughly 2.45% over the 2008 work programme, reflecting the average inflation in the EU during the intervening period as published by Eurostat.

**Table 3.2: Travel allowances**

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

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

### **Annex 3.1: Maximum Reimbursement Rates (Coordination and Support Actions)**

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

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

<sup>36</sup> Rates for individual countries are obtained by applying to these rates the correction factors for cost of living, as referred in Table 3.3

**Table 3.3 Correction Coefficients – The EU-25 Member States**<sup>37, 38</sup>

Austria	102.2
Belgium	100.0
Cyprus	99.0
Czech Republic	77.2
Denmark	133.5

Estonia	76.5
Finland	112.0
France	104.4
Germany	101.5
Greece	90.1

Hungary	66.5
Ireland	113.3
Italy	103.9
Latvia	71.1
Lithuania	71.2

Luxembourg	100
Malta	97.5
Netherlands	101.2
Poland	71.6
Portugal	91.4

Slovak Rep.	82.2
Slovenia	80.8
Spain	95.5
Sweden	108.9
UK	109.2

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

Albania	80.2	Cape Verde	82.3*	Fiji	73.5	Indonesia	53.9	Mexico	74.4	Russia	122.6	Tanzania	61.7*
Algeria	88.7	Cen African Rep.	119.1	FYROM	71.7	Israel	109.5	Moldova	58.5*	Rwanda	90.9*	Thailand	67.7
Angola	121.8*	Chad	129.4	Gabon	123	Jamaica	90.5	Morocco	89.5	Saudi Arabia	84.6	Togo	89.4
Argentina	54.9*	Chile	71.5	Gambia	60.5	Ivory Coast	98.7*	Mozambique	77.7	Senegal	87.7	Trinidad & Tobago	68.6*
Armenia	123.5	China	77.4	Gaza Strip	92.1	Japan (Naka)	101	Namibia	72.5	Serbia	66.1	Tunisia	71.5
Australia	112.2	Colombia	82.1	Georgia	96.6	Japan (Tokyo)	106.5	Nepal	78.8*	Sierra Leone	76.6*	Turkey	85.9*
Bangladesh	48.2	Congo	130.2	Ghana	69.2*	Jordan	75.9*	New Caledonia	135.3	Singapore	102.5	Uganda	69.4*
Barbados	127.5*	Costa Rica	70.8*	Guatemala	79*	Kazakhstan	121.6*	New Zealand	109.6	Solomon Islands	94.8	Ukraine	108.2
Benin	91.9	Côte d'Ivoire	98.7	Guinea(Conakry)	49.2*	Kenya	81.9	Nicaragua	57.3*	South Africa	60.2	US	103.1*
Bolivia	48	Croatia	106.8	Guinea-Bissau	100.7	Kyrgyzstan	84.3*	Niger	87	South Korea	117.3*	Uruguay	69.8
Bosnia & Herzegovina	78.7	Cuba	86.1	Guyana	61.3*	Laos	74.2	Nigeria	86.1	Sri Lanka	53.2	Vanuatu	122.6
Botswana	58.1*	Dem Rep Congo	131.6	Haiti	114.8*	Lebanon	92.3*	Norway	132	Sudan	55.1*	Venezuela	64.1*
Brazil	93.2	Djibouti	94.3	Honduras	69.7	Lesotho	62	Pakistan	50.7	Suriname	49.4	Vietnam	51.5
<b>Bulgaria</b>	<b>80.4</b>	Dominican Rep.	69.3	Hong Kong	94.8	Madagascar	84.7*	Panama	61	Swaziland	57	West Bank	92.1
Burkina Faso	90.7	Ecuador	64.8	India	47.6*	Malawi	73.1*	Papua NewGuinea	74.3	Switzerland	109.8	Yemen	76*
Cambodia	69.8	Egypt	49.6	Indonesia(Jakarta)	79.5*	Malaysia	74.4	Paraguay	78.8*	Switzerland(Bern)	109.7	Zambia	56.3*
Cameroon	103.5	El Salvador	76.6*			Mali	86.3*	Peru	77.5	Syria	70.6*		
Canada	92.7*	Eritrea	51.3			Mauritania	65.3	Philippines	64.4	Taiwan	83.7		
		Ethiopia	87.1*			Mauritius	69.5	<b>Romania</b>	<b>73.9</b>	Tajikistan	66.5*		

<sup>37</sup> For the EU-25 Member States based on the Council Regulation No 1895/2006 of 19 Dec 2006 (OJ L397, 30.12.2006) page 6, adjusting the weightings applicable to the remuneration of officials of the European Communities. For the other countries (and Bulgaria and Romania as most recent two EU Member States in transition) it is based on an updating of **Council Regulation (EC) No 453/2007 of 25 April 2007 laying down the weightings applicable from 1 July 2006 to the remuneration of officials of the European Communities**. Please note that the basis of the calculation of the two sets of coefficients differ in detail)

<sup>38</sup> For countries where the correction coefficient is not available (not indicated in the table, Afghanistan, Azerbaijan, Belarus, Burundi, Liberia, Micronesia, Uzbekistan, Samoa, Somalia, Tonga, Zimbabwe), the Commission will decide on a **case-by-case** basis. For countries where there are multiple entries, but none of them exactly match the location of the fellowship, then the lowest coefficient for that country will be applied. For Iceland the rate of Norway applies.

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

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

3.1 Action IAPP		Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
		- A - Monthly living and mobility allowance	- B - Travel Allowance	- C - Career exploratory allowance	- D - Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	- F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
Marie Curie Industry-Academia Partnerships and Pathways	For seconded staff members	<p><b>1- Monthly living allowance:</b> fixed amount as specified in Table 3.1.</p> <p><b>2- Monthly mobility allowance:</b> fixed amount to cover expenses linked to the relocation of the researcher and her/his family in the host country: reference rate of EUR 500 for researchers without a family and EUR 800 for researchers with family. The reference date for the family situation is the date recruitment of the researcher.</p>	Fixed amount as specified in Table 3.2.	<i>N/A</i>	<i>N/A</i>	Contribution to the host organisation for the execution of the partnership project/programme (publication of vacant positions, internal training actions), participation of eligible researchers in research and transfer of knowledge activities (research costs, participation meeting and conference attendance, etc), organisation of conferences, workshops and events (invitation of keynote speakers, publications, rental of premises) and contribution to the expenses related to the co-ordination between participants (partnership meetings, detachment of staff, etc): fixed amount of EUR 1 200 per researcher month.	<i>N/A</i>	Maximum 3 % of the total Community contribution	10 % of direct costs except for subcontractors and the costs of the resources made available by third parties that are not used in the premises of the beneficiary.	<p><b><u>For participating SMEs only:</u></b></p> <p>Small equipment expenses up to a maximum of 10% of the total contribution to the SME participant, if :</p> <ul style="list-style-type: none"> <li>- duly justified for the project</li> <li>- on the basis of real costs</li> <li>- on prior agreement by the Commission.</li> </ul>
	For newly recruited researchers			The monthly living allowance and the monthly mobility allowance rates for individual countries are obtained by applying to these rates the correction factor for the cost of living as referred to in Table 3.3.	Fixed amount of EUR 2 000 for each researcher with a stay of at least one year.					

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

2.2/4.3 Action ERG – IRG <sup>39</sup>	Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
	- A - Monthly living and mobility allowance	B Travel Allowance	- C - Career exploratory allowance	- D - Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	- F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
2.2 Marie Curie European Reintegration Grants	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	Contribution managed by the hosting organisation for expenses related to the integration of the researcher in the host institution: fixed amount scheme (EUR <u>15 000</u> ) per researcher/year during the period of reintegration up to a max. of 3 years.
4.3 Marie Curie International Reintegration	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	Contribution managed by the hosting organisation for expenses related to the integration of the researcher in the host institution: fixed amount scheme (EUR <u>25 000</u> ) per researcher/year during the period of reintegration up to a max. of 4 years.

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

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

4.2 Action IIF		Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
		- A - Monthly living and mobility allowance	- B - Travel Allowance	- C - Career exploratory allowance	- D - Contribution to the participation expenses of eligible researchers	- E - Contribution to the research/training /transfer of knowledge programme expenses	- F - Contribution to the organisation of international conferences, workshops and events	- G - Management activities (including audit certification if applicable)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
Marie Curie Incoming International Fellowships	Incoming phase	<p><b>1- Monthly living allowance:</b> fixed amount as specified in Table 3.1.</p> <p><b>2- Monthly mobility allowance:</b> fixed amount to cover expenses linked to the relocation of the researcher and her/his family in the host country: reference rate of EUR 500 for researchers without a family and EUR 800 for researchers with family. The reference date for the family situation is the relevant deadline for submission of proposals.</p> <p>The monthly living allowance and the monthly mobility allowance rates for individual countries are obtained by applying to these rates the correction factor for the cost of living as referred to in Table 3.3.</p>	Fixed amount as specified in Table 3.2.	<u>N/A</u>	Contribution managed by the hosting organisations for expenses related to the participation of eligible researchers to research and training activities (meeting and conference attendance, participation in training actions, research costs, etc): fixed amount of EUR 500 per researcher-month for non-laboratory based research projects ; EUR 800 per researcher-month for laboratory based research projects.	<u>N/A</u>	<u>N/A</u>	Fixed-amount of EUR 700 per researcher-month, to which the correction factor for the cost of living as referred to in Table 3.3, is applied. The total amount of this contribution cannot exceed 20% of the total direct costs excluding the direct eligible costs for sub-contracting and the costs of resources made available by third parties which are not used on the premises of the beneficiary.	<u>N/A</u>	
	Possible return phase <sup>40</sup>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	<u>N/A</u>	Contribution managed by the hosting organisation for expenses related to the integration of the researcher in the host institution: fixed amount scheme (EUR <u>15000</u> ) per researcher/year during the period of reintegration up to a max. of 1 year.

<sup>40</sup> In cases of durations that are not a multiple of 12 months, the contribution will consist of monthly fixed amounts calculated as a proportion of the yearly amounts.