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Community Research

# Structuring the European Research Area Human Resources and Mobility Marie Curie Actions

INFORMATION PACKAGE

## WORK PROGRAMME

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HUMAN RESOURCES AND MOBILITY

# Table of Contents

0. GENERAL INTRODUCTION .....	3
<b>1. General</b> .....	3
<b>2. Scope of Work Programme</b> .....	3
<b>3. Cross Cutting Issues</b> .....	3
<b>4. Submitting a Proposal</b> .....	5
<b>5. Evaluation Criteria and Related Issues</b> .....	5
<b>6. Specific Support Actions</b> .....	6
I. STRUCTURING COMMUNITY RESEARCH.....	7
2. Human Resources and Mobility .....	7
2.1. Introduction .....	7
2.2. General objectives, principles and action lines.....	7
<b>2.3.1. - Host-driven actions</b> .....	10
<b>2.3.1.1. - Marie Curie Research Training Networks</b> .....	10
<b>2.3.1.2. - Marie Curie Host Fellowships for Early Stage Research Training</b> .....	13
<b>2.3.2.1. - Marie Curie Intra-European Fellowships</b> .....	23
<b>2.3.2.2. - Marie Curie Outgoing International Fellowships</b> .....	24
<b>2.3.2.3. - Marie Curie Incoming International Fellowships</b> .....	26
<b>2.3.3. - Excellence promotion and recognition</b> .....	28
<b>2.3.3.1. - Marie Curie Excellence Grants</b> .....	28
<b>2.3.3.2. - Marie Curie Excellence Awards</b> .....	30
<b>2.3.3.3. - Marie Curie Chairs</b> .....	31
<b>2.3.4. - Return and Reintegration Mechanisms</b> .....	33
<b>2.3.4.1. - Marie Curie European Reintegration Grants</b> .....	33
<b>2.3.4.2. - Marie Curie International Reintegration Grants</b> .....	35
<b>2.3.5. - Co-operation with Member States and Associated Countries</b> .....	37
2.4. Co-operation with other Research Areas and Programmes.....	39
2.5. General principles for the implementation of the activities .....	40
<b>2.5.1 “Bottom-up” approach</b> .....	40
<b>2.5.2. Participants</b> .....	40
<b>2.5.3. Eligible researchers</b> .....	41
<b>2.5.4. Conditions applicable to the projects</b> .....	44
2.6. Planning of activities and budgetary aspects .....	47
2.7. Call information.....	48
2.8. Community contribution and specific applicable rates.....	62
<b>2.8.1 Rates applicable to the “Marie Curie” Actions</b> .....	62
<b>2.8.2 Structure of the Community contribution</b> .....	65
<b>2.8.3 Additional financial information</b> .....	74
Mob-A. Road Map of Calls for Proposals 2004-2006.....	75
Mob-B. Evaluation criteria for evaluating proposals.....	76

## **0. GENERAL INTRODUCTION**

### **1. General**

Following the adoption of the specific programme for research, technological development and demonstration: "Structuring the European Research Area" and the rules of participation and dissemination, the Commission adopted and updated as appropriate, with the assistance of the programme committee, this work programme which sets out in greater detail the objectives and technological priorities and the timetable for implementation of the specific programme.

In updating this work programme, the Commission has relied on advice mainly from advisory groups. More information on the list of members of the advisory groups is available on Cordis. These groups of independent high-level experts have been set up to advise on the implementation of Community research policy. The experts are renowned for their knowledge, skills and top-level experience in the field or regarding the issues to be dealt with by the groups.

### **2. Scope of Work Programme**

The scope of this work programme corresponds to that defined in the specific programme. The calls for proposals planned within this work programme are those foreseen to close in 2004 and 2005 along with, in many cases, an indication of those calls intended to close in 2006. Annex A gives an overview of these calls.

### **3. Cross Cutting Issues**

There are several issues that are important to all parts of the work programme. These are addressed here and, as appropriate, elaborated in the various parts.

- a) This work programme places special emphasis on the needs of small and medium-sized enterprises (SMEs) and on encouraging their participation.
- b) Proposers based in Associated States may take part in this programme on the same footing and with the same rights and obligations as those based in Member States. In addition, this work programme underlines the importance of involving Associated Candidate Countries in the Community's research policy and in the European Research Area. Specific support actions will also be implemented to stimulate, encourage and facilitate the participation of organisations from the candidate countries in the activities of this work programme. These will comprise information, awareness and training activities, promotion of candidate country competencies, support to researchers from these countries to participate in conferences and to prepare proposals, establishment and reinforcement of networks or centres of excellence between Member States and candidate countries, and between centres of excellence of candidate countries and within candidate countries, evaluation of RTD systems and policies in a particular field, the screening of research establishments active in a particular field, and prospective studies aimed at defining research policies and organisation of research systems in a particular field.

c) International co-operation represents an important dimension of the Sixth Framework Programme. As a contribution to a European Research Area open to the world, it is implemented in the Sixth Framework Programme through four major routes:

- The opening of “Focusing and Integrating Community Research” to third country organisations with substantial funding,
- Specific measures in support of international co-operation,
- International activities under the heading of Human Resources, and
- Participation and funding for third country entities under the other headings (Research and Innovation, Research Infrastructures, Science and Society).

The first two are implemented through the specific programme “Integrating and strengthening the European Research Area”. The third, and the fourth, as part of the specific programme “Structuring the European Research Area”, are covered by the present work programme.

- *International activities under the heading of Human Resources*

Marie Curie actions are open to third country researchers under all the Host driven schemes (Marie Curie Research Training Networks, Marie Curie Host Fellowships for Early stage Training, Marie Curie Host Fellowships for Transfer of Knowledge, Marie Curie Conferences and training courses) and the Excellence Promotion and Recognition schemes). Experienced researchers can apply for a Marie Curie International Incoming fellowship scheme, and organisations in third countries can host European researchers under the Marie Curie International outgoing fellowship scheme. The stay in Europe of a third country researcher in case of developing countries and emerging and transition economies can be complemented, if requested, by a re-integration grant in the country of origin.

- *Participation and funding for third country entities under the other headings (Research and Innovation, Research Infrastructures, Science and Society)*

International co-operation with third country<sup>1</sup> partners and international organisations is actively fostered on all topics, which will benefit from such co-operation. Furthermore, third country entities and international organisations can benefit from a Community financial contribution. To this end, topics for international co-operation will be specified, where appropriate, in calls. This applies particularly to those third countries with which co-operation agreements have been concluded.

d) Research activities carried out under this work programme must respect fundamental ethical principles. More information on the review procedure that is foreseen is given in the guidelines given in the “Guidelines on Proposal Evaluation Procedures”. Annex B to this work programme also details the issues to be covered in any ethical review.

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<sup>1</sup> Please check on Cordis for updates on countries excluded from cooperation, in line with the Communities external policies.

- e) This work programme attempts, where possible, to reinforce and increase the place and role of women in science and research both from the perspective of equal opportunities and gender relevance of the topics covered.
- f) Whilst a series of specific measures are set out in section 4 to create a better connection between the work of scientific endeavour and society at large, other parts of this work programme should also lead to actions that engage actors beyond the research community and the public at large, spread awareness and knowledge, explore the wider societal implications of research work, and create synergies with education at all levels.
- g) In the context of the regular report to be submitted to the European Parliament and the Council, the Commission will report in detail on progress in implementing the specific programme, and, in particular, progress towards achieving its objectives and meeting its priorities.

#### **4. Submitting a Proposal**

Proposals should be submitted under the terms of a call for proposals<sup>2</sup>. In order to submit a proposal, a proposer should consult the following:

- This work programme,
- The relevant call for proposals as it is published in the *Official Journal of the European Communities*, and
- The relevant Guide for Proposers.

These and a number of other useful texts, including the rules for participation and details on the contracts, are available on Cordis (as referred to above).

#### **5. Evaluation Criteria and Related Issues**

The “Guidelines on Proposal Evaluation Procedures” describes the basic procedures to be followed by all programmes under the Sixth Framework Programme of the European Community.

The set of common criteria applicable to this work programme is given in Annex B. Any specific or complementary criteria are clearly stated in the relevant part of this work programme. Evaluation thresholds for each set of common criteria are given in Annex B and apply unless otherwise clearly stated.

All proposals which deal with ethical issues and any proposal for which ethical concerns have been identified during the scientific evaluation may be reviewed by a separate ethical review panel before they are selected for funding. The “Guidelines on Proposal

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<sup>2</sup> Proposals for specific support 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.

Evaluation Procedures” gives more details on the evaluation procedure as a whole as well as details of the ethical review procedure.

Furthermore, the work programmes, and consequently their calls for proposals, may specify and restrict the participation of legal entities in an indirect action according to their activity and type, according to the instrument deployed and to take into account specific objectives of the Framework Programme.

Calls for proposals may involve a two-stage evaluation procedure. When such a procedure is employed, this is stated clearly in the call for proposals. More information on this process is given in the “Guidelines on Proposal Evaluation Procedures”.

## **6. Specific Support Actions**

Support activities are more limited in scope than the accompanying measures of the previous Framework Programmes. These projects aim to contribute actively to the implementation of activities of the work programme, the analysis and dissemination of results or the preparation of future activities, with a view to enabling the Community to achieve or define its RTD strategic objectives. Therefore, a significant emphasis has been placed on Support Actions:

- to promote and facilitate the dissemination, transfer, exploitation, assessment and/or broad take-up of past and present programme results (over and above the standard diffusion and exploitation activities of individual projects);
- to contribute to strategic objectives, notably regarding the European research area (e.g. pilot initiatives on benchmarking, mapping, networking, etc.);
- to prepare future community RTD activities, (e.g. via prospective studies, exploratory measures. pilot actions etc.);
- to sustain the mechanism for a European approach to research infrastructures.

as opposed to awareness and information exchange activities, e.g. annual Workshops and Conferences, that would take place anyway without Commission support. The latter activities will not be welcome if they do not serve the programme’s strategic objectives, (in the sense of the European Research Area, improved co-ordination, public awareness, preparation of future Community initiatives, etc.).

# I. STRUCTURING COMMUNITY RESEARCH

## 2. Human Resources and Mobility

### 2.1. Introduction

The Human Resources and Mobility activity is part of the *Specific Programme for research, technological development and demonstration: "Structuring the European Research Area" (2002-2006)*<sup>3</sup>. This Work Programme focuses on the implementation of this part for remainder of 2004 and for the years 2005-2006. This Work Programme is applicable to all proposals for which the call has a closing date<sup>4</sup> after its adoption. Proposals for which the call has a closing date<sup>5</sup> before the adoption of this Work Programme are governed by the previous version of the Work Programme<sup>6</sup>, except if otherwise expressly indicated.

It should be noted that this Work Programme differs from previous versions. Changes include, but are not limited to the further development of some of the objectives with accompanying modifications in the evaluation criteria, weightings and thresholds for some of the actions, and also a two-stage proposal evaluation procedure has been introduced where appropriate.

### 2.2. General objectives, principles and action lines

The overall strategic objective of the Human Resources and Mobility activity is to provide broad support for the development of abundant and dynamic world-class human resources in the European research system, taking into account the inherent international dimension of research.

With a view to the successful creation of the European Research Area, the Human Resources and Mobility activity involves a coherent set of actions, largely based on the financing of structured mobility schemes for researchers. These are essentially geared to the development and transfer of research competencies, the consolidation and widening of researchers' career prospects, and the promotion of excellence in European research. All actions under this activity are named "Marie Curie" actions.

Within the boundaries of the specific objectives and implementation modalities of the different actions, Marie Curie actions are open to all fields of research which contribute to the objectives of the Community as defined in article 163 of the EC Treaty.

Equally so, all actions are open to organisations active in research or research training. It should be noted that this includes industrial research participants, amongst others SMEs.

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<sup>3</sup> Council Decision of 30 September 2002 adopting a specific programme for research, technological development and demonstration: 'structuring the European Research Area' (2002–2006) (2002/835/EC) downloadable from <http://www.cordis.lu/fp6/specificprogrammes/>

<sup>4</sup> The relevant closing dates as foreseen in the calls for proposals, including so-called "cut-off dates"

<sup>5</sup> The relevant closing dates as foreseen in the calls for proposals, including so-called "cut-off dates"

<sup>6</sup> Commission Decision of 19 January 2004, COM(2004) 48

Within this activity, particular attention is paid to:

- the development of research activity in the less-favoured regions of the EU, new Member States and Associated Candidate Countries, and to the need for increased and more effective co-operation between research disciplines and between academia and industry, including SMEs.
- the participation of women within all actions, and appropriate measures to promote a more equitable balance between men and women in research. In this context the Commission and the host organisations selected under the actions will strive for at least 40 % selection of women.
- the personal circumstances relating to mobility, particularly with respect to the family, career development and languages.

With a view to further reinforcing the human potential for European research, this activity also aims to attract the best and most promising researchers from third countries, promote the training of European researchers abroad and stimulate the return of European scientists established outside Europe.

The presentation of the different instruments is given in conformity with the order given in the Council Decision for the Specific Programme and is as follows:

- Marie Curie Host-driven actions

These actions are aimed at supporting research networks, research organisations and enterprises (including in particular SMEs), in the provision of structured global schemes for the transnational training and mobility of researchers, and the development and transfer of competencies in research including complementary skills (research programme management, ethics, communication, career development, etc). The actions concerned are intended to have a strong structuring effect on the European research system, in particular by encouraging junior researchers to pursue a research career.

- Marie Curie Individual-driven actions

These actions are aimed at supporting the career development of individual researchers who are in the process of reaching positions of professional maturity and independence. They aim to respond to researchers' particular needs, with a view to complementing individual competencies, enhancing inter/multidisciplinarity, research management skills and intersectoral mobility. They also address the linkages between European and third countries' researchers.

- Marie Curie Excellence Promotion and Recognition

These actions focus on the promotion and recognition of excellence in European research, thereby increasing its visibility and attractiveness. They aim at promoting European research teams, especially in new and/or emerging areas of research, and at highlighting personal achievements of European researchers, with a view to supporting their further development and international recognition, while also promoting the diffusion of their work for the benefit of the scientific community.

- Marie Curie Return and Reintegration Mechanisms

Marie Curie Return and Reintegration Grants are directed at researchers from the EU and Associated Countries who have just completed a Marie Curie fellowship of at least two years or who have carried out research outside Europe for at least 5 years, not necessarily on a Marie Curie fellowship, and who wish to return to Europe.

- Co-operation with Member States and Associated Countries

The Human Resources and Mobility activity will seek to co-finance initiatives which foster co-operation and create synergies with and within programmes at national and regional level where these coincide with the specific objectives of the schemes outlined above. Such co-operation will be established on the basis of relevant Community criteria, with a view to creating genuine access to these initiatives for all EU and Associated Country researchers, playing a complementary role regarding programmes at national and regional level, notably by opening up access to these programmes for non-national researchers, as well as promoting cross-boarder training of researchers, and by promoting the adoption of mutually-recognised research training standards.

Initiatives will be continued to reinforce co-operation with Member States and Associated Countries in the provision of 'proximity support' to researchers, which is a key element of any mobility scheme for researchers moving within or returning to Europe. This would in particular be realised through the support to the networking of existing and new structures, at national or regional level, with the aim of providing practical assistance to foreign researchers in matters (legal, administrative, familial or cultural) relating to their mobility.

Further actions in the co-operation with Member States include a Researchers in Europe initiative and actions developed and implemented through the Open Method of Co-ordination (OMC).

## **2.3. Technical content and implementation of Specific Actions**

### **2.3.1. - Host-driven actions**

This line of action is implemented by the following:

- *Marie Curie Research Training Networks*
- *Marie Curie Host Fellowships for Early Stage Research Training*
- *Marie Curie Host Fellowships for the Transfer of Knowledge*
- *Marie Curie Conferences and Training Courses*

#### **2.3.1.1. - Marie Curie Research Training Networks**

##### ***Specific objectives of the action***

*These [Networks] provide the means for research teams of recognised international stature to link up, in the context of a well-defined collaborative research project, in order to formulate and implement a structured training programme for researchers in a particular field of research. Networks will provide a cohesive, but flexible framework for the training and professional development of researchers, especially in the early stages of their research career. Networks also aim to achieve a critical mass of qualified researchers, especially in areas that are highly-specialised and/or fragmented; and to contribute to overcoming institutional and disciplinary boundaries, notably through the promotion of multidisciplinary research. They will also provide a straightforward and effective means to involve the less-favoured regions of the EU and Associated Candidate Countries in internationally recognised European research co-operation.*

Projects supported in this action will have to exploit the network structure to the best extent possible, typically combining local specialist training with network-wide, interdisciplinary/intersectorial training and research activities. The joint collaborative research training projects will aim at increasing the number of researchers in areas where there is an identified training need, addressing one or more of the following:

- Integrating different disciplines - bringing together and integrating different disciplines, especially towards the derivation of novel concepts, approaches and frameworks;
- Industry-academia cooperation - establishing or furthering co-operation in research and research training between academia and industry and/or other relevant economic actors;
- Overcoming fragmentation - overcoming fragmentation in areas where there is a lack of pan-European collaboration and integration or where the scientific community is too small and or dispersed to achieve a critical mass in research and research training, potentially hindering a significant advancement in knowledge.

Particular attention will be paid to the genuine integration in the networks of teams from the new Member States, Candidate and other Associated Countries, and other Less Favoured Regions of the EU.

## **Implementation**

### ***Participants***

A participant in this action is an organisation that is a member of a network selected by the Commission and that recruits eligible researchers or directly contributes to the research and training project of the network.

A network in this action shall be composed of at least three participants (e.g. universities, research centres, companies, SMEs) *established in at least three Member or Associated States from which two must be Member or Associated Candidate Countries*. However, it is anticipated that a network will normally consist of a larger number of participants.

### ***Projects***

The joint collaborative research project undertaken by the network is to provide a platform for training, for the transfer of knowledge and for career development of the researchers recruited in the frame of the network. The researchers are therefore to be fully integrated into the research by involving them, for example, in exchanges between teams, network meetings, collaborative research or the dissemination of results. In this context, participants will also need to develop a structured programme for training (e.g. courses, seminars, intersectorial training periods, training in research management and exploitation of research results) and mentoring (e.g. supervision, career guidance) to the benefit of all researchers recruited by the network.

Participants will be given significant autonomy and flexibility in the detailed operation of the network.

The size of the project and of the network will depend on the nature and scope of the research and training activities to be undertaken by the network, as well on considerations regarding management and effective interaction among the participants. Based on the experiences of the first call for Research Training Networks in the Sixth Framework Programme, most networks have a project duration of 4 years, a number of participants ranging from 6 to 14, and an overall approximate budget ranging from € 1 500 000 to € 3 000 000.

### ***Eligible Researchers<sup>7</sup>***

This action will be directed at **early stage researchers**, for the purpose of initial training (including within the frame of doctoral studies) while **experienced researchers** will be eligible with respect to the needs of transfer of knowledge in the project. Researchers with more than 10 years of research experience (full-time equivalent), counting from the time the degree/diploma was obtained giving access to embark on a doctorate<sup>8</sup> in the country where it has been awarded, will not be eligible for selection.

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<sup>7</sup> The definitions applicable to eligible researchers are given in point 2.5.3.

<sup>8</sup> The degree must entitle the holder to embark on doctoral studies, without having to acquire any further qualifications.

Projects that are clearly multi-/interdisciplinary, intersectoral and/or genuinely leading-edge might require a larger proportion of experienced researchers; otherwise networks are to concentrate on early stage researchers.

Each researcher will establish, together with his/her personal supervisor, a *Personal Career Development Plan* comprising his/her training needs and scientific objectives and 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.

The training opportunities for researchers within the coherent training and mobility scheme provided by the project may range from 3 months to 3 years.

In the case of a researcher being seconded to another participant for a period of more than 30 % of the total period of recruitment, he/she will have to be recruited by this other participant.

### ***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution: The activities developed by the participants in order to attain the objectives of this action may be funded by the Community under the conditions given in the table in Section 2.8.2. Major imbalances among the participants, or in terms of the funds allocated to one particular country, would have to be justified in the proposal. Normally, no more than 40% of the funding awarded should be allocated to the participants of one country.

### ***Timetable of implementation***

In 2004, a dedicated call for proposals is foreseen for networks that will specifically address the objectives outlined in the first two bullet points in section “Specific objectives of the action”.

A second and last call for proposals under the Sixth Framework Programme in 2006 will be open for projects in the complete range of the objectives set for this action.

For further details see Annex to Human Resources and Mobility.

### 2.3.1.2. - Marie Curie Host Fellowships for Early Stage Research Training

#### *Specific objectives of the action*

*These [Fellowships] will be targeted at higher education and research institutions, training centres and enterprises, with a view to reinforcing their training capability. The scheme will be directed at researchers in the early stages of their professional career. It will focus on the acquisition of specific scientific and technological competencies in research, as well as of complementary skills.*

In line with this objective, this action aims at:

- Encouraging mechanisms to substantially improve co-ordination and mutual recognition of research training between the participating organisations and beyond and, at an international level, the quality of the training, thereby enhancing the structuring effect of this action on research training at European level;
- Supporting the development (including in the sense of critical mass) of the offer of structured training (typically within the framework of doctoral studies and including general modules of structured training and/or experimental research work) and its internationalisation, for researchers at the beginning of their careers from Member States, Associated States and third countries;

This research training, to be performed by one or more European organisations within higher education, research and training centres and enterprises, including SMEs, will be consistent with the offer and demand of the research training in the specific field and will be directed at increasing the researchers' profile in terms of both scientific skills (acquisition of specific scientific and technological competencies in research), as well as complementary skills (e.g. in management, ethics, communication), in order to train the researchers involved for diverse career paths in research.

#### *Implementation*

##### *Projects and Participants*

Participants in this action are the organisations, selected by the Commission. The selected organisations recruit and host the eligible researchers.

Applications under this action may be submitted either:

- by a single host (one participant), if necessary supplemented by one or more research groups at local and/or regional level in the same country or at cross-border level<sup>9</sup>, working together on common researchers training programmes, or

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<sup>9</sup> "Cross-border" here corresponds with the definition of "cross-border" as applied under INTERREG IIIA in so far that it comprises those NUTS III areas (including certain NUTS III maritime areas) situated along the **internal** borders of the EU, as well those INTERREG IIIA areas within the EU adjacent to Associated States and Associated Candidate Countries.

- by multi-partner hosts (more than one participant) such as those involved in formal collaboration in the organisation of international doctoral studies (e.g. Euro-PhDs). In this case there must be at least three host organisations established in three different Member States or Associated States, of which two must be Member States or Associated Candidate Countries. Training must be open to researchers from outside the partners. The quality of the training provided by each participating partner must be mutually recognised by all partners and, where possible, the same will be expected with regard to the awarded degrees.

The projects must encompass a clear development of the training capabilities of the participants at international level. The participants must present a structured development plan of their training offer, in particular concerning its international co-operation aspects and the development of skills that support diverse career paths in research (agreements between participants on co-tutoring, courses, supervision, common training between the participants, complementary skills training, exchange of eligible researchers or other personnel, monitoring of the career development of the trained researchers, etc). This plan will be evaluated as an essential component of the submitted proposal and will be the object of continuous monitoring throughout the duration of the project.

The maximum duration of a project will normally be four years from the date of commencement specified in the contract.

The size of an EST project will depend on the nature and the scope of the training programme and the capacity in terms of supervision and management of the host-organisation(s). The size of projects will also depend on the number of participants and on the relation with the demand of researchers in the particular field. As an indication, based on the experiences of the first call for this action in the Sixth Framework Programme, projects have a budget ranging between approximately €300 000 and €3 000 000. As an objective, 15 % of the overall budget for this action is to be directed towards the participation of industrial/commercial companies.

### ***Eligible researchers***<sup>10</sup>

Within this action only early stage researchers can be recruited. The opportunities for training will be for periods between 3 months and 3 years within a coherent training and mobility project.

Each researcher will establish, together with his/her personal supervisor, a Personal Career Development Plan comprising his/her training needs and scientific objectives and 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.

In the context of “multi-partner hosts”, it is expected that researchers recruited for more than one year will stay with more than one participant during the training period. In the case of a researcher being seconded to another participant for a period of more than 30 % of the total period of recruitment, he/she will have to be recruited by this other participant.

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<sup>10</sup> The definitions applicable to eligible researchers are given in point 2.5.3.

***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution, rates: The activities developed by the participants in order to attain the objectives of this action may be funded by the Community under the conditions given in the table in Section 2.8.2. For “multi-partner hosts” not more than 40% of the funding awarded should normally be allocated to the participants of one country.

***Timetable of implementation***

See Annex to Human Resources and Mobility.

### 2.3.1.3. – Marie Curie Host Fellowships for the Transfer of Knowledge

#### *Specific objectives of the action*

*These [Fellowships] will be directed at European organisations (universities, research centres, enterprises, etc.) in need of developing new areas of competence, as well as at furthering the development of research capabilities in the less-favoured regions of the EU and in the Associated Candidate Countries. Knowledge transfer fellowships will allow experienced researchers to be hosted at such organisations for the transfer of knowledge, research competencies and technology.*

#### ***Implementation***

This action will be implemented through the following two schemes:

##### **A. Marie Curie Development Scheme**

This scheme is directed to the reinforcement of the research potential of host entities, with priority to entities situated in Less Favoured Regions of the EU, new Member States and in the Associated Candidate Countries, in need of new areas of competence.

#### ***Projects and participants***

Participants in this action are the organisations, selected by the Commission. The selected organisations recruit, host and/or send out the eligible researchers.

Projects are constituted by a coherent overall plan focussed on the reinforcement of the research potential of organisations in need of developing new knowledge, with priority to organisations situated either in less favoured regions of the Member States or in the Associated Candidate Countries, in order to:

- host experienced researchers, recruited for a period up to 2 years, following an international publication of vacancies if appropriate and optionally,
- send experienced researchers from among the participant's own staff to one or more distinct and independent partner organisations in another Member State, Associated State or third country (in this last case, only in duly justified exceptional circumstances) for the acquisition of new knowledge to be transferred and developed upon by them on their return to their home organisation.

In the second case, the project will thus include obligatorily both an initial phase of new knowledge acquisition (up to 1 year) in the legal entity which is a partner organisation hosting the researcher and a subsequent second phase of effective transfer and development of this knowledge in the organisation of origin of the researcher (i.e. the participant) of the same duration as the initial phase. The organisations which will provide this training will be pre-determined and designated in the submitted proposal to the Commission, and will be taken into account at the time of the evaluation of the projects.

### ***Community financing***

In the first case, the Community financing will cover the transfer of knowledge phase by the hosted researchers. In the second case, the Community financing will cover both the phase of acquisition of new knowledge and the phase of transfer and further development of knowledge in the organisation of origin of the researcher. The organisation of origin (i.e. the participant) will have to secure by contract the commitment of its researcher(s) to return for at least one year in order to further develop the acquired knowledge there or, otherwise, refund the payments already received under this action.

As an objective, 70% of the budget of the *Marie Curie Development Scheme* should be directed towards projects transferring knowledge to Less Favoured Regions in the EU, new Member States and to Associated Candidate Countries.

### ***Eligible researchers<sup>11</sup>***

This action is addressed to experienced researchers<sup>12</sup>. The proportion of researchers in either direction should be balanced with respect to the objective described in the proposal. Typically no more than 50 % of the person-months should be used for outgoing experienced staff members.

The support granted to eligible researchers will be for periods of between 2 months to 2 years and is part of an overall coherent plan. For outgoing researchers sent out to transfer knowledge back home, the minimum period for each phase (of equal duration) is from 2 months up to one year.

Staff members of the host sent out to gain or transfer knowledge must return to their organisation of origin after the mobility period to transfer the knowledge home. To be eligible, outgoing researchers must have been active in the same organisation continuously for at least the last 2 years.

### **B. Marie Curie Industry-Academia Strategic Partnership Scheme**

This scheme is directed to the creation and development of real strategic and durable partnerships between the academic world and the world of enterprises, in particular SMEs, aiming at the establishment of lasting collaborations of mutual interest.

### ***Projects and participants***

This scheme supports projects for the creation and development of strategic partnerships between the academic world and the world of enterprise, presented jointly by the participants, being on the one hand one or more universities/research centres and on the other hand one or more companies, in particular SMEs. The different participants should be from at least 2 different Member or Associated States<sup>13</sup>. These projects aim to allow

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<sup>11</sup> The definitions applicable to eligible researchers are given in point 2.5.3.

<sup>12</sup> Non-scientific staff members involved in research activities can be assimilated as being experienced researchers and are eligible for this action.

<sup>13</sup> If there are two participants, at least one must be from a Member State or an Associated Candidate Country; if there are three or more participants, at least three host organisations should be established in

the participants through the intersectoral exchange, in one or both directions, of experienced researchers<sup>14</sup> to develop their knowledge by integration of researchers from a different sectoral environment and to acquire and benefit from new knowledge when the researchers sent out return. Such strategic research partnership projects can be coordinated either by an industrial or an academic participant.

Whilst respecting the normal rules for minimum participation of organisations for Member States and Associated States, intersectoral mobility is also allowed between two participants in the same Member State or Associated State, within the frame of the overall coherent transfer of knowledge plan for all the participants and up to a maximum of 30% of the researchers' months in the project.

Within this scheme, the industrial partners must be organisations operating on a commercial basis, i.e. companies gaining the majority of their revenue through competitive means with exposure to commercial markets, and will include incubators, start-ups and spin-offs, venture capital companies, etc. Preference is given to projects aimed at fostering new, inter-sectorial, lasting research collaborations beyond the term of the contract, or at strengthening of existing collaborations.

### ***Community financing***

The Community financing will cover the secondment of the researchers to the other sector participant(s) for a period of up to 2 years.

The participants from which the researchers originate will have to secure by contract the commitment of its researchers to return for at least one year in order to further develop the acquired knowledge there or, otherwise, to refund the amount already received under this action.

As an objective, 30% of the budget of the *Marie Curie Industry-Academia Strategic Partnership Scheme* should be directed towards the participation of SMEs.

### ***Eligible researchers<sup>15</sup>***

To be eligible, staff members of a participant must have been active continuously for at least 2 years in the sector that they will temporarily leave in the frame of this scheme. The support granted to eligible researchers will be for periods of between two months to 2 years and is part of an overall coherent plan as laid down in the project.

### ***Common conditions of both schemes***

#### ***Projects and participants***

For both schemes, participants must demonstrate the capacity (in terms of research staff, infrastructure and management) either to provide the knowledge to be transferred or to

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three different Member States or Associated States, of which two must be Member States or Associated Candidate Countries.

<sup>14</sup> Non-scientific staff members involved in research activities can be assimilated as being experienced researchers and are eligible for this action.

<sup>15</sup> The definitions applicable to eligible researchers are given in point 2.5.3.

absorb the transferred knowledge. They must also demonstrate that this transfer will significantly increase their research quality and overall RTD capabilities and, in the case of the Industry-Academia exchange scheme, contribute to the enhancement of inter-sectorial research collaboration. Furthermore, applicant hosts must demonstrate the availability of appropriate researchers willing to transfer the requested knowledge as well as the existence at the host organisation of a critical mass of researchers to whom the particular knowledge transfer can be made.

For this purpose, the proposal should contain an overall plan that demonstrates the needs for new knowledge and the strategy of transferring and exploiting the acquired knowledge.

The maximum duration of a project will normally be four years from the date of commencement given in the contract. As an indication, based on the experiences with the first call for this action under the Sixth Framework Programme, the size of the projects will vary between approximately €200 000 and €1 200 000, compatible with the capacity and nature of the training activities performed.

### ***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution, rates: The activities developed by the participants in order to attain the objectives of this action may be funded by the Community under the conditions given in the table in Section 2.8.2.

### ***Timetable of implementation***

See Annex to Human Resources and Mobility.

### **2.3.1.4. - Marie Curie Conferences and Training Courses**

#### ***Specific objectives of the action***

*These [Conferences and Training Courses] will enable junior researchers to benefit from the experience of leading researchers. Support will be given to specific training activities (including virtual ones) that highlight particular European achievements and interests.*

#### ***Implementation***

This action concentrates on measures to support the organisation of coherent series of training courses and/or non-repetitive high-level conferences with a specific training value, as well as the funding of the participation of eligible researchers in these events. Events can last from a few days to a few weeks, and are to be presented as a single proposal by one or more organisers and covering one or more particular subjects.

The events should highlight either particular European achievements in research or alternatively research topics in which Europe has a strong interest and where the event contributes to its uptake in Europe. This means that the subjects to be discussed or taught should be those where recent advances achieved in the Member States or Associated States are worth being passed on to researchers in the early stages of their career, or those where recent advances achieved elsewhere, in topics of interest to Europe, need to be passed on to researchers from the Member States and Associated States. In both cases, the foreseen composition of the audience and the identity of the speakers will be a factor in determining the Community added value.

Funding of the participation of eligible researchers in “Large Conferences”, as provided for under the previous version of the Work Programme, is no longer foreseen. As a consequence, no further calls are planned for the funding of the participation of eligible researchers in large conferences.

#### **Marie Curie Series of events**

##### ***Participants***

The participants in this action are organisations, selected by the Commission, that organise the events and/or host the researchers to be trained.

One series of events may be organised by a single entity, which thus assumes the entire responsibility, or by several entities (local organisers), each of which would be responsible to the co-ordinator both for the financial part and the technical execution of the event(s), which they manage.

##### ***Projects***

A series of events may combine practical events (schools or practical training courses) with conference-style events as described below. In order to be eligible, a project should include at least 4 events. There is no upper limit in the number of events per project. The events within a proposed series should together make a coherent programme of training

and professional advancement for researchers. Where they cover several themes, their grouping together should be justified from a scientific and/or training point of view or from an organisational point of view. This action shall not cover series of events consisting merely of periodic repetitions of conference-style events with identical themes.

The type of events in a project can be either **training courses** or **conferences**, or a combination of the two. **Training courses** in this sense are schools or practical courses organised in universities, research organisations, scientific centres or industrial facilities etc, providing advanced training for eligible researchers, typically lasting from one to a few weeks. The courses are to be organised around specific scientific or technological themes, and/or address research management, ethics, communication and related subjects of value for the career development of researchers. They must have a defined syllabus. Appropriately qualified experts should provide the training. Practical courses would involve substantial hands-on laboratory or field experience for the participants. **Conferences** under this action are high-level scientific/technological meetings with a focused theme at the cutting edge of research bringing together researchers with a different level of experience, typically lasting a few days.

Each event should have duration of a maximum of 4 weeks, and will normally take place in Member States, Associated States. Other event venues may be exceptionally allowed if suitably justified with respect to the objectives. Events in a series may have venues in different locations.

The number of attendees (with or without Community support) in each event will typically not exceed 150.

Events taking place less than six months after the corresponding deadline for the reception of proposals mentioned in the call shall be ineligible. All events in a series should be organised within a period of 4 years.

As an indication, based on the first call under this action in the Sixth Framework Programme, the size of the projects will approximately vary between €180 000 and €1 400 000.

### ***Eligible researchers<sup>16</sup>***

This action will primarily be directed at early stage researchers. More experienced researchers will also be able to benefit from this action where the possibilities offered in the contract are not used for early stage researchers. Researchers with more than 10 years of research experience (full-time equivalent), counting from the time the degree/diploma was obtained giving access to embark on a doctorate in the country where it was awarded, will not be eligible for support, except in the case of researchers who are nationals of Member States, or Associated States active outside these states at the time of an event: these researchers shall be eligible, so that they may establish or strengthen links with the European research community (contact building effect for the transfer of knowledge).

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<sup>16</sup> The definitions applicable to eligible researchers are given in point 2.5.3.

An international balance between the participants shall be guaranteed; no more than 30% of the total number of those attending each event within a series should be nationals of the same Member State or Associated State, or third countries *collectively*.

**Marie Curie Large Conferences**

No further calls are foreseen for the funding of the participation of eligible researchers in large conferences.

***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution, rates: The activities developed by the participants in order to attain the objectives of this action may be funded by the Community under the conditions given in the table in Section 2.8.2.

***Timetable of implementation***

See Annex to Human Resources and Mobility

## **2.3.2. - Individual-driven actions**

This line of action is implemented by the following:

- *Marie Curie Intra-European Fellowships*
- *Marie Curie Outgoing International Fellowships*
- *Marie Curie Incoming International Fellowships*

### **2.3.2.1. - Marie Curie Intra-European Fellowships**

#### *Specific objectives of the action*

*These [Fellowships] will allow the most promising researchers from EU and Associated countries to undertake training through research in the European organisations most appropriate to their individual needs. The topic will be freely chosen by the researcher in collaboration with the host, with a view to completing or diversifying his/her expertise.*

More particularly, this action is aimed at experienced researchers from Member States or Associated States to respond to their particular needs with a view to adding different/complementary scientific competencies in the process of reaching and/or reinforcing a position of professional maturity and independence (e.g. advanced training in multi-disciplinary fields, advanced training related to an interdisciplinary transfer, intersectoral experiences at senior level, ) or to permit them to resume their career. The action will permit the best and most promising experienced researchers to undertake transnational mobility in the European organisations most appropriate to their individual needs, directed towards competence diversification, without providing merely a subsequent step to continue their work in the same research field.

Co-operation will be sought with comparable initiatives of the Member States, Associated States and research (funding) organisations at European level, in order to achieve better synergies between programmes which broaden possibilities for career development of researchers.

#### *Implementation*

##### *Projects and participants*

This action provides financial support for training and mobility, for a period of 12 to 24 months, for individual projects presented by experienced researchers in liaison with a host organisation from a Member State, or Associated State.

The research topic will be chosen by the researcher in collaboration with the host, with a view to the above described competence diversification.

##### *Eligible researchers<sup>17</sup>*

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<sup>17</sup> The definitions applicable to eligible researchers are given in point 2.5.3.

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

### ***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution, rates: The activities developed by the participants in order to attain the objectives of this action may be funded by the Community under the conditions given in the table in Section 2.8.2.

### ***Timetable of implementation***

See Annex to Human Resources and Mobility

## **2.3.2.2. - Marie Curie Outgoing International Fellowships**

### ***Specific objectives of the action***

*These [Fellowships] will be awarded to researchers from EU and Associated Countries to work in established third country research centres, thereby widening their international experience in research. This scheme will require the submission of a coherent individual training programme, involving a first phase abroad, followed by a mandatory second phase in Europe.*

This action, open towards the rest of the world, aims to respond to the needs for reinforcing the international dimension of the career of European researchers by giving them the opportunity to be trained and acquire new knowledge in a world level third country research organisation, and then to apply the experience gained in an organisation in a Member State or Associated States.

### ***Implementation***

#### ***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 States. The contracts will be concluded with the return host organisations of the Member States or the Associated States for a total duration of up to 3 years. It is mandatory for the project to include a coherent training programme of up to 3 years including an initial training phase of minimum one to 2 years in a distinct legal entity in a third country (“partner organisation”) and a re/integration phase (i.e. typically half the duration of the first phase) within the contracting organisation (“return host organisation”) in the Member States or Associated States. The reintegration phase will normally commence directly after the termination of the initial training 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 his/her expertise.

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

As this action concerns an overall and coherent training and mobility action, the return host organisation will need to commit itself contractually vis-à-vis the Commission to ensure the commitment of their researcher to carrying out the reintegration phase within the organisation concerned, so as to capitalise effectively on the knowledge and experience gained, failing which they will need to reimburse the amount received for this action.

As an indication, based on the experiences with the first selections for this action under the Sixth Framework Programme, the size of projects will approximately vary between € 120 000 and €240 000.

### ***Eligible researchers<sup>18</sup>***

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

Third country researchers are not eligible for this action, including those treated as being from Member States or Associated States because of their presence for more than 4 years during the previous 5 years in the territory of a Member State or Associated State.

### ***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution, rates: The activities developed by the participants in order to attain the objectives of this action may be funded by the Community under the conditions given in the table in Section 2.8.2.

### ***Timetable of implementation***

See Annex to Human Resources and Mobility.

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<sup>18</sup> The definitions applicable to eligible researchers are given in point 2.5.3.

### **2.3.2.3. - Marie Curie Incoming International Fellowships**

#### ***Specific objectives of the action***

*These [Fellowships] will aim at attracting top-class researchers from third countries to work and undertake research training in Europe, with the view to developing mutually-beneficial research co-operation between Europe and third countries. In the case of emerging and transition economies and developing countries, the scheme may include provision to assist fellows to return to their country of origin.*

This action will reinforce the scientific excellence of the Member States and the Associated States thanks to the application of the knowledge thus transferred during this period of mobility and will also constitute a springboard for the future development of relations between the Member States or Associated States and the third countries.

#### ***Implementation***

##### ***Projects and participants***

This action aims to respond to the needs for individual training and mobility of the best, experienced third country researchers, thus reinforcing the international dimension and attractiveness of Europe, by giving them the opportunity to come to a research organisation of a Member State or an Associated State.

It consists of financial support to individual mobility projects presented by the best, experienced researchers in liaison with a legal entity (“host organisation”) in the Member States or Associated States, as well as possibly another one (“reintegration host organisation”) in the researcher’s country of origin in the case of developing countries and emerging and transition economies.

In the case of developing countries and emerging and transition economies, the projects may include a phase of reintegration in the country of origin, within the framework of an overall and coherent project elaborated with a view to the development of a mutual interest between the Member States/Associated States and the third countries concerned.

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

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

As an indication, based on the experiences with the first selections for this action under the Sixth Framework Programme, the size of the projects will approximately vary between €70 000 and €180 000.

### ***Incoming phase***

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

### ***Possible reintegration/return phase***

The possible return phase, of typically half the duration of the incoming phase, aims at the application, in their country of origin, of the experience gained during their period of international mobility by the researchers from developing countries and emerging or transition economies benefiting from a *Marie Curie* Incoming International Fellowship. It also aims to encourage these researchers to plan their period of international mobility within the framework of a coherent professional project and thus promote the likelihood of developing a research career and building up the research capacity of the country of origin.

In this case, the proposal will comprise on submission a description of a possible return/reintegration phase in an identified reintegration host organisation.

The return phase will normally commence directly after the termination of the incoming phase; in well justified cases (e.g. family reasons such as children's education; period needed to move to the reintegration host; period required to terminate on-going research work, etc) the starting date can be postponed for up to a maximum of 6 months from the termination of the incoming phase.

A contract is issued with the reintegration host organisation, which will commit itself to assure an effective and lasting reintegration (attested by all adequate legal means) of the researcher for at least a period of 2 years. 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<sup>19</sup>***

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 State.

Third country researchers are eligible for this action, except those treated as being from Member States or Associated States because of their presence for more than 4 years during the previous 5 years in the territory of a Member State or Associated State.

### ***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution, rates: The activities developed by the participants in order to attain the objectives of this action may be funded by the Community under the conditions given in the table in Section 2.8.2.

### ***Timetable of implementation***

See Annex to Human Resources and Mobility.

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<sup>19</sup> The definitions applicable to eligible researchers are given in point 2.5.3.

### **2.3.3. – Excellence promotion and recognition**

This line of action is implemented by the following:

- *Marie Curie Excellence Grants*
- *Marie Curie Excellence Awards*
- *Marie Curie Chairs*

#### **2.3.3.1. – Marie Curie Excellence Grants**

##### ***Specific objectives of the action***

*These [Grants] aim at providing support for the creation and development of European research teams which are considered to have the potential to reach a high level of excellence, more particularly for leading edge or interdisciplinary research activities.*

These teams will be built up around a researcher who has early in her/his career the potential to reach a high level of excellence so as to enable her/him to attain more rapidly a position with responsibility for leading a team that executes, in priority, a leading edge and/or interdisciplinary research programme. The aim is to help to create excellent, transnational, dynamic and stimulating focal points in Europe.

This action will also contribute to counteracting brain drain, especially by encouraging high potential researchers who are currently active in third countries to resume their careers and bring to bear their potential for excellence in Europe.

Synergies will be sought with host organisations and comparable initiatives of the Member States, Associated States and research organisations at European level, in order to achieve a greater prospect of career continuity.

##### ***Implementation***

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

The project shall be prepared jointly by the researcher, who will be the team leader, and the host organisation. The host organisation, in which the project will be developed and executed, may be from the academic or industrial sector, or other research organisations, and may be in a Member State or Associated State. The host organisation will be the contractor and shall provide the necessary infrastructural and administrative support to ensure that the team leader can carry out the project effectively.

To this end, a specific agreement will be concluded between the team leader and the contracting organisation to regulate their relations. This agreement shall be transmitted to the European Commission. It shall guarantee the necessary autonomy to the team leader to carry out the project in question. The European Commission may authorise, in duly motivated and exceptional circumstances, a change of contractor on the request of the team leader if necessary to ensure further development of the project.

The research themes should be relevant to European achievements and interests, or on a subject in which European research could gain competitiveness and reach a leading position on the world stage. In this context, the research topic will be freely chosen by the researcher in collaboration with the host, with a view to complete and/or diversify his/her expertise; clear preference will be given to leading edge or multidisciplinary research activities.

As an indication, based on the experiences with the first selections for this action under the Sixth Framework Programme, the financial size of projects in this action will approximately vary between €850 000 and €2 000 000.

### *Composition of excellence teams*

The target group is researchers who are capable and ready to set up their own research team or to extend their recently created team, with a European dimension. The target group includes researchers returning from outside the Member States and the Associated States.

The transnational character of the activity and of the team as a whole should be proven by the career profile of the team leader (in terms of her/his transnational mobility in the frame of high quality international research co-operation) as well as by the envisaged balanced composition of the team (including the leader). Moreover, the work programme and the division of tasks among team members should present sufficient guarantees that a significant contribution to the objective of reaching a high level of excellence within Europe will be made.

The team, consisting of a designated team leader and further team members, should conduct their research project in one of the Member States or Associated States.

The team leader shall be a researcher who in the development of her/his career, is showing the potential to reach a high level of autonomy and excellence and the potential capabilities to create or develop an excellence team. The team leader may be a national of any country. Proposals will not be eligible for financial support if, at the time of the relevant deadline for submission of proposals, the prospective team leader has already been working (under any form of recruitment) for 12 months or more over the last 3 years in the same host organisation where the team is proposed to be located; nor can the team consist of a majority of members who, at the time of their appointment, have worked (under any form of recruitment) for 12 months or more over the last 3 years in the organisation hosting the team.

The team leader shall be the scientific co-ordinator of the project. He/she shall be free to choose his/her team members, on condition of respecting the transnational character of the project as indicated above. Team members need not be identified before the start of the project. The host organisation will be required to publish vacancies in international professional publications.

Researchers selected by the team leader can be of any nationality. There is no upper limit to the number of team members, or to their level of experience, but the composition of the team should be appropriate for the execution of the project.

### ***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution: The activities developed by the participants in order to attain the objectives of this action may be funded by the Community under the conditions given in the table in Section 2.8.2.

Community funding will normally be granted for a maximum period of four years.

### ***Timetable of implementation***

See Annex to Human Resources and Mobility

## **2.3.3.2. – Marie Curie Excellence Awards**

### ***Specific objectives of the action***

*These [Awards] are scientific prizes to give public recognition to excellence achieved by research workers who have in the past benefited from training and mobility support by the Community.*

### ***Implementation***

This action aims at expressing public recognition of the degree of excellence achieved by researchers who have benefited from EC mobility support for research training under the Sixth Framework Programme or previous framework programmes. The action gives the opportunity to acknowledge periods of mobility and transnational training in the scientific community and to disseminate the research results achieved.

It is intended to award five prizes per year.

### ***Projects and participants***

The prizes are awarded to individuals. Candidates for the prizes can propose themselves or they can be nominated by others.

The candidates shall be among those who have been awarded a Marie Curie mobility grant under the 6<sup>th</sup> Framework Programme, or have participated in a mobility or training action of one of the previous Framework Programmes, for a minimum period of 12 months, and who have achieved excellent research results.

The Prize holders will be selected by the Commission following pre-evaluation by panels of experts on thematic disciplines and deliberations by a Marie Curie Grand Jury. This jury will be composed of highly renowned and recognised public personalities of different backgrounds, such as from science, industry, humanities, and politics. The jury members will be appointed on the basis of, amongst other things, suggestions by Member States or Associated States as well as international European interest organisations.

The Prize holders will be expected to participate in public events, which promote and improve the visibility, recognition and attractiveness of European research careers in the context of the European Research Area and contribute to a better understanding by the public at large of science as an important economic and societal factor.

### ***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Each prize will be worth €50 000.

### ***Timetable of implementation***

See Annex to Human Resources and Mobility.

## **2.3.3.3. - Marie Curie Chairs**

### ***Specific objectives of the action***

*These [Chairs] will be awarded for the purpose of making top-level appointments, in particular to attract world-class researchers and encourage them to resume their careers in Europe. This scheme may be developed in synergy with the host-driven actions.*

Synergies will be sought with host organisations and comparable initiatives of the Member States, the Associated States and research organisations at European level, in order to achieve a greater prospect of career continuity.

### ***Implementation***

#### ***Projects and participants***

This action supports world-class researchers for a period of research and lecturing at a host institution (e.g. an organisation of higher education) in a Member State or Associated State.

This action should also attract European researchers of world reputation who are active outside the Member States or Associated States and to encourage them to resume or further develop their careers in Europe.

The project shall be proposed by the candidate in liaison with the host organisation in which the project will be developed and executed. The host organisation, which will be the contractor, shall provide all the administrative and logistical support necessary to ensure that the chair holder can carry out the project most effectively.

To this end, a specific agreement will be concluded between the chair holder and the contracting organisation to regulate their relations. This agreement shall be transmitted to the European Commission. It shall guarantee the necessary autonomy to the chair holder to carry out the project in question. The European Commission may authorise, in duly

motivated and exceptional circumstances, a change of contractor on the request of the chair holder if necessary to ensure further development of the project.

The participation to this action of organisations that are already hosting researchers under other Marie Curie actions is permitted.

The subject(s) to be taught should be of a leading edge and/or multi-disciplinary nature, and correspond to directions in research, which are relevant for Europe.

### ***Chair Holder***

The chair holder shall be an experienced researcher of any nationality, with outstanding past achievements in international teaching and collaborative research wishing to carry out a transnational mobility or come back to a Member State, or Associated State.

The **chair holder** will give lectures and teach research courses to students at graduate and/or postgraduate levels, as well as carry out research and supervise research and thesis work, in subjects of relevance to Europe. In addition, the chair holder may be expected to participate in events designed to publicise top level research and to demonstrate the attractiveness of research careers as well as to show the impact of research on society.

**The post** should be full-time or comprise a minimum of 70% of a full-time position over the course of one academic year, of which at least half should be spent on teaching and supervising thesis work. The other, remaining part should be spent on research.

The **Chairs** can be funded for a period of normally three years but shorter periods (not less than one year) may be accepted.

As an indication, based on the experiences with the first selections in this action under the Sixth Framework Programme, the financial size of projects under this action varies between € 260 000 and € 700 000 approximately.

### ***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution: The activities developed by the participants in order to attain the objectives of this action may be funded by the Community under the conditions given in the table in Section 2.8.2.

### ***Timetable of implementation***

See Annex to Human Resources and Mobility.

## 2.3.4. - Return and Reintegration Mechanisms

This line of action is implemented by the following:

- *Reintegration mechanism for researchers who have previously benefited from a Marie Curie action (Marie Curie European Reintegration Grants)*
- *Reintegration mechanism for European researchers having left for a third country since more than five years (Marie Curie International Reintegration Grants)*

### 2.3.4.1. - Marie Curie European Reintegration Grants

#### *Specific objectives of the action*

*Marie Curie Return and Reintegration Grants will be directed at researchers from the EU and Associated Countries who have just completed a Marie Curie fellowship of at least two years. The mechanism will assist the professional reintegration of the research worker, the priority being given to reintegration in his or her country or region of origin.*

The action also intends to encourage the researchers to place their transnational mobility period within the framework of a coherent professional project and to promote the perspectives of the development of their research career.

#### *Implementation*

##### *Projects and participants*

This action aims at offering the opportunity to researchers of Member States or Associated States, to capitalise on their transnational mobility period after having participated in a *Marie Curie* action with a duration of at least 24 months either under the Sixth Framework Programme<sup>20</sup>, or under any other training and mobility action under the previous Framework Programmes.

This action consists of a lump sum, in the form of a grant of one year duration. It will be allocated for the benefit of researchers' reintegration, via (re)integration hosts, on the basis of a well-defined project that will not only endorse but also give added value to the benefits gained during the previous period of mobility. The project will be evaluated on its own merits.

The mechanism will assist the professional reintegration of the researcher in an organisation different from the one in which he/she has been carrying out his/her initial fellowship, priority being given to reintegration in his/her country or region of origin<sup>21</sup>.

<sup>20</sup> *Marie Curie* actions eligible in this context are: *Marie Curie* Research Training Network; *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.

<sup>21</sup> Defined as the country of nationality.

Submitted applications will be evaluated and selected continuously, as described in the call information under point 2.7. The proposals can be submitted in the first 6 months of the last year of the initial training/mobility period or until the subsequent relevant closing date as foreseen in the call for proposals. In the case of rejection of the first proposal, and as an exception to this, proposers will be offered the right to resubmit a proposal for the following evaluation session. The (re)integration grant will normally commence directly after the termination of the original Fellowship; in well justified cases (e.g. family reasons such as children's education; period needed to move to the reintegration host; period required to terminate on-going research work) the starting date can be postponed for up to a maximum of 6 months.

A contract is issued with the (re)integration host in a Member State or Associated State, which will commit itself to assure an effective and lasting reintegration (attested by adequate legal means) of the researcher (for at least a period of 2 years). Evidence that researchers will be integrated on a longer-term basis in the (re)integration host will be positively taken into account during evaluation. The (re)integration host will have to secure with the Commission the commitment by contract of its researcher to stay for at least 2 years in order to carry out the presented reintegration programme.

The grant is to be used as a contribution to the scientific costs relating to the researcher's project at the reintegration host. The grant can also be used as a contribution to the salary costs of the researcher, in case the project concerns a researcher returning to a Less Favoured Region in the EU, new Member States as well as to an Associated Candidate Country.

### ***Eligible researchers<sup>22</sup>***

The Commission will select the researchers from Member States or Associated Countries, benefiting or having benefited during at least 24 months of a training and mobility action under the Sixth Framework Programme<sup>23</sup>, or under any other training and mobility action of the previous Framework Programmes, on the basis of proposals jointly submitted by the researcher and the reintegration host in the first 6 months of the last year of the initial training and mobility period, or until the subsequent cut off date.

### ***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution: The grant will be paid as a lump sum to the (re)integration host. The activities developed by the participants in order to attain the objectives of this action may be funded under the conditions given in the table in Section 2.8.2.

### ***Timetable of implementation***

See Annex to Human Resources and Mobility

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<sup>22</sup> The definitions applicable to eligible researchers are given in point 2.5.3.

<sup>23</sup> *Marie Curie* actions eligible in this context are: *Marie Curie* Research Training Network; *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.

## **2.3.4.2. - Marie Curie International Reintegration Grants**

### ***Specific objectives of the action***

*A similar mechanism than the Marie Curie European reintegration grants, but covering a longer period, up to two years, will apply to European researchers who have carried out research outside Europe for at least 5 years, with or without having benefited from a Marie Curie action, and who wish to return to Europe.*

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 5 years, with or without having benefited from a Marie Curie action, to return to a Member State or to an Associated State in order to contribute to European research and transfer the knowledge they have acquired in a third country, by offering them the opportunity to capitalise in Europe on their experience. It is aimed at reversing and cancelling the effects of the European brain drain to third countries. It should also allow the development of lasting co-operation with the scientific and/or industrial milieu of the third country from which they have returned.

### ***Implementation***

#### ***Projects and participants***

This action consists of financial support during at least 2 years for professional reintegration projects in the research area in a host organisation in a Member State or Associated State. 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.

Submitted applications will be evaluated and selected continuously, as described in the call information under point 2.7. For selected projects a contract is issued with the (re)integration host organisation, which will commit itself to assure an effective and lasting reintegration (attested by all possible contractual means) of the researcher for at least a period of 3 years. Evidence that the researcher will be integrated in the host organisation on this basis for a longer term will be positively taken into account during evaluation.

The host organisation will have to secure with the Commission the commitment by contract of the researcher to return for at least 3 years in order to carry out the presented project.

### ***Eligible Researchers<sup>24</sup>***

This action will benefit experienced researchers from the Member States or Associated States, who at the relevant closing date as foreseen in the call for proposals have been active in research in a third country for at least 5 years and who will return to a Member State or Associated State.

They should not be resident in any of the Member States or Associated States (i.e. they should not have spent more than 1 year in the Member States or Associated States during the previous 3 years, with an exception for short stays, holidays, parental leave, sick-leave or home leave etc.).

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

### ***Community contribution, rates and applicable evaluation criteria***

Evaluation criteria: see Annex Mob-B.

Community contribution: The activities developed by the participants in order to attain the objectives of this action may be funded by the Community under the conditions given in the table in Section 2.8.2.

The financial support may take the form of a grant:

- to be used as a contribution to the scientific costs relating to the researcher's project at the reintegration host. Where appropriate, the reintegration grant could include funding for the enhancement of the host's equipment required to carry out the research work, or
- to support complementary activities to those already covered possibly by Community (including financing granted under a different *Marie Curie* action), or other public (international, national, regional,...) financing as long as the principle of forbidding double financing is respected.

The grant will be paid as a lump sum to the host organisation.

### ***Timetable of implementation***

See Annex to Human Resources and Mobility

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<sup>24</sup> The definitions applicable to eligible researchers are given in point 2.5.3.

### **2.3.5. - Co-operation with Member States and Associated Countries**

Different initiatives aim to respond to the objective of reinforcing human resources in research in Europe and of stimulating a culture of transnational mobility within a European career structure among both European and non-European researchers and host organisations in Member States or Associated States, in particular for:

- co-operation with and between the Member States and Associated States on both policy and programme related issues regarding human resources and mobility in research, in terms of for instance exchange, transfer or dissemination of information or good practices, identification and implementation of synergies, co-operation between those responsible for programmes at national and regional levels;
- further development, operation as well as animation of the Researcher's Mobility portal and European network of Mobility Centres;
- development and operation of a dynamic framework for analysing relevant trends as regards career paths and flows of geographical and intersectoral mobility, based on surveys, benchmarks, indicators and statistics ;
- development and implementation of initiatives to introduce a European dimension to researchers careers, for instance a European Researchers Charter, a Code of conduct for the recruitment of researchers, criteria and means for recording different professional achievements in research, new ways of doctoral training and the overall working conditions for doctoral candidates, alternative tenure track contracts, pathways between industry and academia etc.
- a "Researchers in Europe Initiative 2005", to strengthen the public recognition of the profession of researchers and careers in R&D and to contribute to the attractiveness of the EU as a reference area for research talent from all over the world.

#### ***Implementation***

These actions will be implemented by the Commission through 2006 and be the object, if the case arises, of calls for proposals, calls for tender or subvention of a project or a work programme submitted directly to the Commission along the following lines.

For actions under bullet point 1, in particular for conferences, subventions for Specific Support Actions (total indicative budget €480.000) are planned for projects and work programmes submitted directly to the Commission, of which for 2004 a subvention (indicative budget €80.000) for a Presidency conference "Brain gain; the instruments".

For the actions under bullet point 2 service contracts under framework agreements by DG RTD are foreseen (total indicative budget €800.000), of which for 2004 a contract (indicative budget €200.000) for a service contract for the researchers' Mobility Portal. Next to this contracts in this frame are foreseen for additional projects concerning the Portal (indicative budget €385.000), including for 2004 two feasibility studies (ERA-LINK and a technical feasibility study) with a total indicative budget of €70.000, as well as in the course of 2004 a technical development project aimed at the multi-lingual aspects, search-engine and retrieval of data between the European and national portals (indicative budget €115.000). All three 2004-projects are to be contracted under framework agreements by DG RTD.

For the further development at European level of the ERA-MORE Network a number of contracts are envisaged both through framework agreements by DG RTD as well as

through subventions for projects and work programmes submitted directly to the Commission (indicative budget € 845.000), of which for the second half of 2004 a contract (indicative budget € 45.000) under framework agreements by DG RTD for a feasibility study on the development of an intranet for the ERA-MORE network.

For part of the actions under bullet point 3 related to trends regarding career paths and flows of mobility a subvention (indicative budget € 1.200.000) is foreseen for multi-annual work by the IPTS<sup>25</sup>, starting in the second half of 2004 (indicative budget € 400.000). In addition, for activities relevant to bullet points 3 and 4, a contract (indicative budget €295.000) is foreseen following a call for tender in the second half of 2004 (study on researchers' salaries) as well as contracts for several other studies of approximately € 50.000 each, following restricted calls for tender in 2005 (total indicative budget € 200.000) and in 2006 (indicative budget €200.000). For a follow-up study in the field of doctoral programmes in Europe (under the actions described in the fourth bullet point) in late 2004 a subvention (indicative budget €295.000) is foreseen for work by the European University Association<sup>26</sup>

As concerns the “Researchers in Europe Initiative 2005” (bullet point 5) a call for proposals for an indicative budget of €3.000.000 will be launched in 2004. The aim of the call is to improve and promote at European level a better understanding of the contribution of researchers to society, to raise the attractiveness of the EU for researchers from all over the world and to encourage more young people to embark on careers in R&D and thereby the number of researchers in Europe. Proposals in the frame of the call should preferably contribute to enhance the bottom up and awareness raising dimension of the Initiative. Applicants should therefore demonstrate an appropriate level of experience in the field of science communication and dialogue with the public, as well as a good understanding of the media. See for the timetable the **Annex to Human Resources and Mobility** and for the community contribution, rates and applicable evaluation criteria Annex B of the work programme for the specific programme for research, technological development and demonstration: “Structuring the European Research Area”. In addition, activities at European level for the said Initiative (amongst others promotion material, media activities, events, tours and campaigns, including follow-up actions, audit), with an indicative budget of €2.800.000 (of which €2.000.000 in 2005) will be implemented through contracts under framework agreements concluded by DG RTD.

As far as not explicitly included in the above, the further indicative calendar for 2005 and 2006 is as follows (amounts in €):

	2005	2006
HRM conferences (bullet point 1)	100.000	300.000
Service contract Portal (bullet point 2)	300.000	300.000
Additional Portal projects (bullet point 2)	100.000	100.000
Animation ERA-MORE (bullet point 2)	400.000	400.000
IPTS (bullet point 4)	400.000	400.000

<sup>25</sup> Specific support action to be implemented in accordance with article 9.2.a. of the Rules for participation and dissemination of the Sixth Framework Programme

<sup>26</sup> Specific support action to be implemented in accordance with article 9.2.a. of the Rules for participation and dissemination of the Sixth Framework Programme

## **2.4. Co-operation with other Research Areas and Programmes**

The role of the Human Resources and Mobility activity is to support research training and the development of research competencies. It plays this role in parallel to the activities undertaken in the context of the thematic priorities. This does not preclude other activities within the Framework Programme from incorporating similar elements. The Human Resources and Mobility activity will provide assistance with regard to the adoption of consistent criteria in relation to the evaluation, selection and monitoring of such actions, as well as the promotion of common approaches among the activities, with a view to ensuring coherence and developing possible synergies, and an equitable balance in the participation of men and women.

Next to this the Human Resources and Mobility activity strives for a better linkage of New Member States and Candidate Countries to the co-operation in National Contact Points.

## 2.5. General principles for the implementation of the activities

### 2.5.1 “Bottom-up” approach

Within the boundaries of the specific objectives and modalities of the different Marie Curie actions, the implementation of the activities in the area of Human Resources and Mobility of the Sixth Framework Programme (FP6) is characterised by a « bottom up » approach expressed in the following ways:

- Freedom is given to the proposers as to the choice of field of research for their projects. The *Marie Curie* actions will therefore be open to all fields of research, which contribute to the objectives of the Community as defined in Article 163 of the EC Treaty, for projects chosen freely by the applicants themselves. However, activities relating to human resources and mobility in areas covered by the EURATOM<sup>27</sup> treaty are not eligible under the actions in the area of Human Resources and Mobility of the Sixth Framework Programme;
- Great initiative is left to the proposers within the objectives of the programme and within general guide-lines (including maximum expenditure) concerning the details permitting a better realisation of the objectives.

In applying this “bottom-up“ approach, there will not be in principle a pre-defined objective in terms of discipline or subject of research for the *Marie Curie* actions, the selection being carried out on the basis of scientific excellence criteria and pertinence of relationship to the objectives of the actions (see criteria in Annex Mob-B). As a general rule the distribution of the indicative budget of the calls between the research disciplines will be based “a posteriori” on the proportion of eligible proposals. Deviation of this rule will be specified in the relevant call for proposals.

### 2.5.2. Participants

- As a general rule, the participant<sup>28</sup> of the *Marie Curie* actions is an organisation<sup>29</sup> active in research or research training (universities, national or international research centres or commercial enterprises, etc) implementing *Marie Curie* actions and signing contracts with the Commission.

#### Conditions specifically applicable to legal entities participating from third countries and international organisations

*For Marie Curie Research Training Networks, Marie Curie Host Fellowships for Early Stage Research Training (multi-partners), Marie Curie Conferences and Training Courses, Marie Curie Incoming International Fellowships*

**Participation** of legal entities from third countries and of international organisations is foreseen under the conditions provided by the rules of participation<sup>30</sup> and by those in the

<sup>27</sup> Sixth Framework Programme for EURATOM 2002-2006, OJ 355 of 30 December 2002

<sup>28</sup> In the sense of the definition specified in the Rules of participation

<sup>29</sup> In the case of Marie Curie Excellence Awards, it may be an individual.

<sup>30</sup> Decision of the European Parliament and Council (<http://www.cordis.lu/fp6/participationrules/>)

present work programme in the following actions: *Marie Curie* Research Training Networks<sup>31</sup>, *Marie Curie* Host Fellowships for Early Stage Research Training (multi-partners)<sup>32</sup>, the possible reintegration phase of the action - *Marie Curie* Incoming International Fellowships and *Marie Curie* Conferences and Training Courses, in the latter case the participation of the third country legal entity will be permitted **over** the minimum number of participants, i.e. a single legal entity as indicated in paragraph 2.3.1.4.

The **financing** of these entities, particularly those established in developing countries, emerging economies or economies in transition, is possible if it is essential to attain the objectives of the action.

#### ***For other Marie Curie actions***

The **participation** and **financing** of third country legal entities and of international organisations is not possible in the case of other types of actions: *Marie Curie* Host Fellowships for Early Stage Research Training (mono-participant), *Marie Curie* Host Fellowships for the Transfer of Knowledge, Individual-driven actions<sup>33</sup>, Excellence Promotion and Recognition, Return and Reintegration Mechanisms.

#### ***Conditions specifically applicable to international European interest organisations***

The participation and financing of the international European interest organisations<sup>34</sup> are foreseen under the conditions provided by the rules of participation<sup>35</sup>.

### **2.5.3. Eligible researchers**

#### **Definitions**

As a general rule, a researcher is defined as a person active in research, including at a training level, of at least post-graduate or equivalent level.

The two following definitions, applicable to the *Marie Curie* actions, are based on the professional experience of researchers in research and not on their age.

These definitions permit to take fully into account the professional pathways as well as the personal and family situations of those willing to embark on a research career or resume research activities irrespective of age or stage of their career.

**Early-stage researchers** are defined as researchers in the first 4 years (full-time equivalent) of their research activity, including the period of research training.

The reference period to qualify for an early stage training activity:

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<sup>31</sup> Right of participation over the minimal number of participants.

<sup>32</sup> Right of participation over the minimal number of participants, only in the case of multi-partner European hosts.

<sup>33</sup> Other than the possible reintegration phase of Marie Curie Incoming International Fellowships.

<sup>34</sup> In the sense of the definition specified in the Rules of participation

<sup>35</sup> Decision of the European Parliament and Council (<http://www.cordis.lu/fp6/participationrules/>)

- is counted from the diploma giving access to doctoral studies (the degree must entitle the holder to embark on doctoral studies, without having to acquire any further qualifications) in the country in which the diploma was obtained,
- covers the first 4 years of experience in research or the period until a doctoral degree is obtained, whichever is shorter.

Persons who have obtained a doctorate are ineligible for the early stage actions, independently of the time taken to acquire it.

The overall cumulative maximum early stage training through *Marie Curie* Host Fellowships for Early Stage Research Training and/or *Marie Curie* Training Networks is 4 years (full-time equivalent).

**Experienced researchers** are defined as i) researchers having at least 4 years of research experience (full-time equivalent) since gaining a university diploma giving them access to doctoral studies (the degree must entitle the holder to embark on doctoral studies, without having to acquire any further qualifications), in the country in which the degree/diploma was obtained or ii) researchers already in possession of a doctoral degree, independently of the time taken to acquire it.

For host-driven actions, the reference deadline for eligibility is the selection of the eligible researcher by the host organisation in the framework of this action. For individual-driven actions, researchers must have at least 4 years of research experience on the date of the relevant deadline for submission of proposals, or have obtained a doctoral degree at the latest eight months after the relevant deadline for submission of proposals. In all cases, the researcher must have met all the necessary requirements for the conferment of the doctoral degree, as officially certified by the awarding body. In the excellence actions, the reference date for determining the experience of the Team Leader (*Marie Curie* Excellence Grants) and Chair Holder (*Marie Curie* Chairs) is the date of the relevant deadline for submission of proposals; for Team Members (*Marie Curie* Excellence Grants) the reference date is the date of their appointment.

Eligible researchers under these schemes are “third party” beneficiaries of the *Marie Curie* actions. They do not sign a contract with the Commission, but benefit from the *Marie Curie* actions and are therefore in this way beneficiaries of Community funds.

### **Rules of mobility and conditions of nationality applicable to eligible researchers<sup>36</sup>**

**Eligible researchers** will be, according to the nature of the action and with respect to the rules of mobility expressed hereafter, nationals of the Member States or the Associated States (1) and/or nationals of third countries (2).

Researchers must be nationals of a State other than that of the host organisation<sup>37</sup>. At the start of their fellowship/activity, researchers may not have resided or carried out their

<sup>36</sup> These rules apply the whole length of the project.

<sup>37</sup> This rule is not applicable to the return phase of the “*Marie Curie* Host Fellowships for the Transfer of Knowledge”, “*Marie Curie* Outgoing International Fellowships”, “*Marie Curie* Incoming International Fellowships”, nor to the actions “*Marie Curie* Reintegration and Return Mechanisms”, “*Marie Curie* Conferences and Training Courses”, and “*Marie Curie* Excellence Grants”; this rule is also not applicable in the “*Marie Curie* Industry-Academia Strategic Partnership Scheme”, provided that (i) the researchers in

main activity (work, studies, etc) in the country of their host organisation for more than 12 months in the 3 years immediately prior to the reference deadline for eligibility<sup>38</sup>. Short stays such as holidays are not taken into account.

For host-driven actions, the reference deadline for eligibility is the selection of the eligible researcher by the host organisation in the framework of this action. For individual-driven actions and for Marie Curie Chairs, the reference is the relevant deadline for submission of proposals.

These mobility rules do not apply to the hosting of eligible researchers by international European interest organisations or international organisations. Eligible researchers may carry out their project in any eligible international organisation, whatever its location. Researchers will have to carry out the project at the premises of a legal entity other than the one in which they carry out their normal activities, or where they have been recruited for less than one year from the date of the reference deadline for eligibility.

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

### *(1) Nationals of the Member States or the Associated States*

Researchers from Member States or Associated States can, according to the nature of the action, carry out their transnational mobility in all other Member States and all other Associated States. These researchers will be considered as being eligible to benefit from a training or mobility action, including in their country of origin, if they can provide evidence that they have legally resided and have had their principal activity (work, studies, etc) in a third country for at least four of the last five years immediately prior to the reference deadline for eligibility.

For host-driven actions, the reference deadline for eligibility is the selection of the eligible researcher by the host organisation in the framework of this action. For individual-driven actions, and for Marie Curie Chairs, the reference is the relevant deadline for submission of proposals.

Mobility of researchers from Member States and Associated States to third countries can only be funded by the Community budget in the cases of “*Marie Curie* Outgoing International Fellowships” and *Marie Curie* Conferences and Training Courses, as well as in cases where this funding is deemed to be essential for the action.

For the purpose of the Marie Curie actions, non-nationals from Member States or Associated States having legally resided and having had their main activity (work, studies

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question ensure a transnational mobility in the frame of the financed actions or (ii) researchers are subject to inter-sectorial mobility as specified in the relevant paragraph of section 2.3.1.3

<sup>38</sup> This rule is not applicable to the return phase of the “*Marie Curie* Host Fellowships for the Transfer of Knowledge”, “*Marie Curie* Outgoing International Fellowships”, “*Marie Curie* Incoming International Fellowships”, nor to the actions “*Marie Curie* European Reintegration Grants”, “*Marie Curie* Conferences and Training Courses” and “*Marie Curie* Excellence Grants”, nor to the researchers subject to intersectoral mobility between two participants in the same country as foreseen under certain circumstances in the “*Marie Curie* Industry-Academia Partnership Scheme”, nor to the recruitments in the same country where the researcher has been previously appointed under the same project for the actions “Research Training Networks” and multi-partner hosts “*Marie Curie* Early Stage Fellowships”.

etc) for at least four of the last five years, measured at the reference deadline for eligibility, in Member States/Associated States are treated as to nationals of the Member/Associated State in which they have resided the longest. This rule is not applicable for the action “*Marie Curie* Outgoing International Fellowships”.

## ***(2) Nationals of third countries***

Participation and funding of researchers from third countries is foreseen in all of the host-driven mobility schemes, in Excellence Promotion and Recognition actions as well as in one of the individual-driven schemes specifically dedicated to these third countries researchers (*Marie Curie* Incoming International Fellowships).

Apart from the case of the possible reintegration phase of the “*Marie Curie* Incoming International Fellowships”, they can not carry out their transnational mobility in third countries.

In the case of host-driven actions, a maximum of 30 %<sup>39</sup> of the number of funded researcher-months can be used for third country researchers. This percentage could be exceeded in exceptional cases under the condition that the excess is duly justified as being essential to attain the objectives of the action. For multi-partner contracts, participating organisations must have a common selection policy in order to avoid exceeding this limit.

### **2.5.4. Conditions applicable to the projects**

#### **Submission of proposals**

The proposals will be submitted either by one or several host organisations (host-driven actions) or by an individual researcher in liaison with a host organisation (individual fellowships, promotion and recognition of excellence, reintegration mechanisms). In the case of *Marie Curie* Excellence Awards, submission can be made by a single individual.

In the individual driven actions, and *Marie Curie* Excellence Grants and *Marie Curie* Chairs, one applicant cannot have more than one proposal in an application procedure at the same time. This does not apply to the host-organisation. For this particular purpose the application procedure is deemed to have terminated with the rejection decision on the proposals in that round, or the notification of being placed on reserve list.

In case of multiple proposal submission in all other cases, including proposed participation in more than one proposal submitted in the same evaluation round of one action or in other actions open at the same time, the applicant-participants<sup>40</sup> will have to demonstrate clearly the capacity to participate in 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 received Community financing under the *Marie Curie*-actions

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<sup>39</sup> The percentage is to be applied for each contract except for the action *Marie Curie* Series of events for which it will be applied per event.

<sup>40</sup> At the appropriate organisational level of where the proposed research and training is to be executed

under the Sixth Framework programme or under similar actions under previous Framework Programmes, the applicant<sup>41</sup> has to demonstrate clearly the substantial added value of the new project in relation to the project previously financed.

### **Evaluation criteria for the proposals**

The submitted proposals will be evaluated on the basis of evaluation criteria given in Annex Mob-B.

### **Conditions for selection of eligible researchers by hosts within the framework of host-driven actions**

Within the framework of host-driven actions, the eligible researchers will be recruited by the host organisations (who are the best qualified to evaluate the quality and potential of the applicants) that have been selected by the Commission. This selection will be carried out on the basis of procedures normally used by them. These procedures must be open to all potential applicants, transparent and must guarantee an impartial and objective treatment of the applicants after the vacant posts have been advertised internationally. The selection procedures may be supported by individual interviews with the potential applicants, examination of letters of motivation, list of most pertinent publications submitted by the applicants (where applicable).

In this context, the criteria for selection of eligible researchers to be applied by the host organisations will comprise in particular: experience in the field of research and/or, in particular for early stage researchers and those concerned with the transfer of knowledge, aptitude of the candidate to carry out his/her individual training/mobility project; potential of excellence, or recognised excellence of the candidate; the impact and benefit of the training to the career of the candidate; scientific quality and in this way its pertinence to his/her individual training/mobility project.

The host organisations must apply a policy of equal opportunities, in particular between men and women, concerning access to training.

These criteria will be mentioned in the contract between the Commission and the host organisation.

### **Conditions for the execution of the projects**

Unless justified in the application or during the implementation of the project, and subject to the mobility rules, the projects must take place totally, or mainly, in the country of the participating legal entities, with the exception of the actions managed by the international European interest organisations or international organisations as well as in the case of the initial training phase of the action *Marie Curie* Outgoing International Fellowships and the action *Marie Curie* Conferences and training courses.

**Eligible Researchers** must devote themselves in principle full-time to the project. However, they will be able to devote themselves part-time if this is duly justified for reasons connected to personal or family circumstances (education of children, child-care, etc). The project may be carried out in several phases, though limited in number. The

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<sup>41</sup> At the appropriate organisational level of where the proposed research and training is to be executed

duration of each phase should have significance for the total project and form a coherent part of it.

In this context, family circumstances of researchers testifying to a partnership agreement (marriage, cohabitation, etc) recognised by applicable national legislation will also be duly taken into account in the implementation of the action (e.g., concerning postponement of the starting date, interruption of stays, etc).

### **Advertisement**

The hosts must indicate in their proposals how they intend, if successfully selected, to widely advertise the fact that they participate in a *Marie Curie* action and receive Community funding.

The opportunities offered by the host organisations participating in the different indirect actions will be the object of publicity on an international level by host organisations using all appropriate methods (press, posters, websites, internet, information at conferences, etc) and will have to be disseminated through the Researcher's Mobility Portal, the CORDIS-site, as well as other appropriate websites. The advertisement strategy for the vacant posts will be duly appraised in the proposals by the Commission at the time of the evaluation and their effective implementation will be, like the other contractual obligations, verified by the Commission Services at the time of execution of the project.

### **Monitoring and impact of the projects and the programme**

There will be systematic and continuous assessment of the quality of the project during its implementation and at the end of the contract. A follow-up of the participants and eligible researchers after the end of the project will also allow assessment of the impact of the activities, especially in terms of career development of the beneficiaries receiving support in the Human Resources and Mobility actions of the present programme.

## 2.6. Planning of activities and budgetary aspects <sup>42</sup>

Actions	Indicative Amounts for calls closed in 2004	Indicative Amounts for calls closed in 2005	Indicative Amounts for calls closed in 2006
Marie Curie Research Training Networks	45	220	
Marie Curie Host Fellowships for Early Stage Research Training	(70) 170		
Marie Curie Host Fellowships for the Transfer of Knowledge - Development Scheme - Industry-Academia Strategic Partner Scheme	(45)	30 15	31 16
Marie Curie Conferences and Training Courses	(10)	12,25	12,25
Marie Curie Intra-European Fellowships	(55)	65	70
Marie Curie International Fellowships: - Incoming - Outgoing	(11) (18)	20 20	22 22
Marie Curie Excellence Grants	(30)	40	45
Marie Curie Chairs	(5)	8	10
Marie Curie Excellence Awards	(0,25)	0,25	0,25
Marie Curie Return and Reintegration Mechanisms - European Reintegration Grants - International Reintegration Grants	19 10	10 10	13 13
Co-ordination and specific support actions <sup>43</sup>	3,7	6,5	2,5

<sup>42</sup> These amounts (in millions of €) comprise the total indicative amounts including contributions from Associated States. Other expenses such as evaluation costs and administration costs are not included. The indicative amounts for 2004 within brackets concern the amounts foreseen for calls already closed; the other amounts for 2004, as well as the amounts for 2005 and 2006 are indicative amounts foreseen for calls open in the year of reference. This does not signify that these amounts will be engaged in the year of reference. Amounts that concern budget appropriations for the years 2005 and 2006 are subject to the availability of the budget

<sup>43</sup> Contrary to the other actions listed in table 2.6, the indicative amounts under Coordination and specific support actions are not foreseen to be engaged on the basis of calls for proposals, with exception of an amount of €3.000.000 under 2005 for a call for proposals for the researcher in Europe Initiative 2005. The amounts mentioned here are based on the description and indicative budgetary distribution contained in § 2.3.5. This paragraph also contains the foreseen ways of committing the different amounts not covered by the call for proposals for the researcher in Europe Initiative 2005.

## 2.7. Call information

Any call budget information relating to 2005 is provided under the condition that the preliminary draft budget for that year is adopted, without adjustments, by the budgetary authority

Any call budget information relating to 2006 is provided as advance information only. A new financing decision to cover the 2006 budget will be requested at the appropriate time next year.

### *Call Information for Marie Curie Research Training Networks for 2004*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Research Training Networks “Interdisciplinarity” and “Intersectorial”
4. **Call identifier:** <sup>44</sup>
5. **Date of publication** <sup>45</sup>: 11 September 2004
6. **Closure date(s)** <sup>46</sup>: 2 December 2004 at 17.00 (Brussels local time).
7. **Total indicative budget:** €45.000.000
8. **Instruments:** see section 2.3.1.1 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.1.1 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): limited to networks corresponding to the specific objectives described in the first two bullet points in section 2.3.1.1 under “Specific objectives of the action”; see also the conditions foreseen in the sections 2.3.1.1 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** The evaluation shall follow a two stage submission. The number of proposals passing to the second stage of submission will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: Results from the first stage are estimated to be available in February/March 2005 and results on the second stage are estimated to be available within some 4 months after the 28 April 2005 closure date for full proposals.
  - Contract signature: it is estimated that the first contracts related to this call will come into force after the summer of 2005.

### *Call Information for Marie Curie Research Training Networks for 2005*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Research Training Networks
4. **Call identifier:** <sup>47</sup>
5. **Date of publication** <sup>48</sup>: 18 May 2005
6. **Closure date(s)** <sup>49</sup>: 08 September 2005 at 17.00 (Brussels local time)
7. **Total indicative budget:** €220.000.000
8. **Instruments:** see section 2.3.1.1 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.1.1 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.1.1 and 2.5 of the work programme

<sup>44</sup> The call identifier shall be given in the published version of this call.

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

<sup>46</sup> When the envisaged publication date is advanced or delayed (see previous footnote), closure date(s) may be adjusted accordingly, if needed.

<sup>47</sup> The call identifier shall be given in the published version of this call.

<sup>48</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>49</sup> When the envisaged publication date is advanced or delayed (see previous footnote), closure date(s) may be adjusted accordingly, if needed.

11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** The evaluation shall follow a two stage submission. The number of proposals passing to the second stage of submission will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: Results from the first stage are estimated to be available in December 2005 and results on the second stage are estimated to be available within some 4 months after the February 2006 closure date for full proposals.
  - Contract signature: it is estimated that the first contracts related to this call will come into force in the first half of 2006.

#### ***Call Information for Marie Curie Host Fellowships for Early Stage Training for 2004***

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Host Fellowships for Early Stage Training
4. **Call identifier:** <sup>50</sup>
5. **Date of publication**<sup>51</sup>: 11 September 2004
6. **Closure date(s)**<sup>52</sup>: 15 December 2004, at 17.00 (Brussels local time)
7. **Total indicative budget:** €170.000.000
8. **Instruments:** see section 2.3.1.2 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.1.2 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.1.2 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** The evaluation shall follow a two stage submission. The number of proposals passing to the second stage of submission will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: for the first stage estimated to be available in March 2005 and results on the second stage are estimated to be available within some 4 months after the 26 April 2005 closure date for full proposals.
  - Contract signature: it is estimated that the first contracts related to this call will come into force after the summer of 2005.

#### ***Call Information for Marie Curie Host Fellowships for the Transfer of Knowledge for 2005***

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Host Fellowships for the Transfer of Knowledge
4. **Call identifier:** <sup>53</sup>
5. **Date of publication**<sup>54</sup>: 15 December 2004

<sup>50</sup> The call identifier shall be given in the published version of this call.

<sup>51</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>52</sup> When the envisaged publication date is advanced or delayed (see previous footnote), closure date(s) may be adjusted accordingly, if needed.

<sup>53</sup> The call identifier shall be given in the published version of this call.

6. **Closure date(s)**<sup>55</sup>: 18 May 2005 at 17.00 (Brussels local time)
7. **Total indicative budget**: €30.000.000 for the Marie Curie Development Scheme and €15.000.000 for the Marie Curie Industry-Academia Strategic Partnership Scheme
8. **Instruments**: see section 2.3.1.3 of the work programme
9. **Minimum number of participants**: see the conditions specified in sections 2.3.1.3 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.1.3 and 2.5 of the work programme
11. **Consortia agreements**: Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure**: The evaluation shall follow a single stage submission; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria**: See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable**:
  - Provisional evaluation results: estimated to be available within some 4 months after the closure date
  - Contract signature: it is estimated that the first contracts related to this call will come into force before the end of 2005.

### ***Call Information for Marie Curie Host Fellowships for the Transfer of Knowledge for 2006***

1. **Specific Programme**: “Structuring the European Research Area”
2. **Activity**: Human resources and mobility activities
3. **Call title**: Call for proposals for Marie Curie Host Fellowships for the Transfer of Knowledge
4. **Call identifier**:<sup>56</sup>
5. **Date of publication**<sup>57</sup>: 20 July 2005
6. **Closure date(s)**<sup>58</sup>: 15 February 2006 at 17.00 (Brussels local time)
7. **Total indicative budget**: €31.000.000 for the Marie Curie Development Scheme and €16.000.000 for the Marie Curie Industry-Academia Strategic Partnership Scheme
8. **Instruments**: see section 2.3.1.3 of the work programme
9. **Minimum number of participants**: see the conditions specified in sections 2.3.1.3 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.1.3 and 2.5 of the work programme
11. **Consortia agreements**: Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure**: The evaluation shall follow a single stage submission; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria**: See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable**:
  - Provisional evaluation results: estimated to be available within some 4 months after the closure date.
  - Contract signature: it is estimated that the contracts related to this call will come into force before the end of 2006.

### ***Call Information for Marie Curie Conferences and Training Courses for 2005***

1. **Specific Programme**: “Structuring the European Research Area”
2. **Activity**: Human resources and mobility activities
3. **Call title**: Call for proposals for Marie Curie Conferences and Training Courses

<sup>54</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>55</sup> When the envisaged publication date is advanced or delayed (see previous footnote), closure date(s) may be adjusted accordingly, if needed.

<sup>56</sup> The call identifier shall be given in the published version of this call.

<sup>57</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>58</sup> When the envisaged publication date is advanced or delayed (see previous footnote), closure date(s) may be adjusted accordingly, if needed.

4. **Call identifier:** <sup>59</sup>
5. **Date of publication**<sup>60</sup>: 19 January 2005
6. **Closure date(s)**<sup>61</sup>: 18 May 2005 at 17.00 (Brussels local time)
7. **Total indicative budget:** €12.250.000
8. **Instruments:** see section 2.3.1.4 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.1.4 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.1.4 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** The evaluation shall follow a single stage submission; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: estimated to be available within some 4 months after the closure date.
  - Contract signature: it is estimated that the first contracts related to this call will come into force before the end of 2005.

### *Call Information for Marie Curie Conferences and Training Courses for 2006*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Conferences and Training Courses
4. **Call identifier:** <sup>62</sup>
5. **Date of publication**<sup>63</sup>: 18 January 2006
6. **Closure date(s)**<sup>64</sup>: 17 May 2006 at 17.00 (Brussels local time)
7. **Total indicative budget:** €12.250.000
8. **Instruments:** see section 2.3.1.4 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.1.4 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.1.4 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** The evaluation shall follow a single stage submission; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: estimated to be available within some 4 months after the closure date.
  - Contract signature: it is estimated that the contracts related to this call will come into force before the end of 2006.

### *Call Information for Marie Curie Intra-European Fellowships for 2005*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Intra-European Fellowships

<sup>59</sup> The call identifier shall be given in the published version of this call.

<sup>60</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>61</sup> When the envisaged publication date is advanced or delayed (see previous footnote), closure date(s) may be adjusted accordingly, if needed.

<sup>62</sup> The call identifier shall be given in the published version of this call.

<sup>63</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>64</sup> When the envisaged publication date is advanced or delayed (see previous footnote), closure date(s) may be adjusted accordingly, if needed.

4. **Call identifier:** <sup>65</sup>
5. **Date of publication**<sup>66</sup>: 28 September 2004
6. **Closure date(s)**<sup>67</sup>: 16 February 2005 at 17.00 (Brussels local time)
7. **Total indicative budget:** €65.000.000
8. **Instruments:** see section 2.3.2.1 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.2.1 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.2.1 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** Two-step evaluation following a single proposal submission. The number of proposals passing to the second stage of evaluation will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: for the first step estimated to be available in May 2005 and results of the second step are estimated to be available within some 6 months after the closure date.
  - Contract signature: it is estimated that the first contracts related to this call will come into force after the summer of 2005.

#### *Call Information for Marie Curie Intra-European Fellowships for 2006*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Intra-European Fellowships
4. **Call identifier:** <sup>68</sup>
5. **Date of publication**<sup>69</sup>: 20 July 2005
6. **Closure date(s)**<sup>70</sup>: 15 February 2006 at 17.00 (Brussels local time)
7. **Total indicative budget:** €70.000.000
8. **Instruments:** see section 2.3.2.1 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.2.1 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.2.1 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** Two-step evaluation following a single proposal submission. The number of proposals passing to the second stage of evaluation will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: for the first step estimated to be available in May 2006 and results of the second step are estimated to be available within some 6 months after the closure date.
  - Contract signature: it is estimated that the contracts related to this call will come into force after the summer of 2006.

<sup>65</sup> The call identifier shall be given in the published version of this call.

<sup>66</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>67</sup> When the envisaged publication date is advanced (see previous footnote), closure date(s) may be adjusted accordingly, if needed.

<sup>68</sup> The call identifier shall be given in the published version of this call.

<sup>69</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>70</sup> When the envisaged publication date is advanced (see previous footnote), closure date(s) may be adjusted accordingly, if needed.

## *Call Information for Marie Curie Outgoing International Fellowships for 2005*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Outgoing International Fellowships
4. **Call identifier:** <sup>71</sup>
5. **Date of publication**<sup>72</sup>: 28 September 2004
6. **Closure date(s)**<sup>73</sup>: 19 January 2005 at 17.00 (Brussels local time)
7. **Total indicative budget:** €20.000.000
8. **Instruments:** see section 2.3.2.2 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.2.2 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.2.2 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** Two-step evaluation following a single proposal submission. The number of proposals passing to the second stage of evaluation will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: for the first step estimated to be available in April 2005 and results of the second step are estimated to be available within some 6 months after the closure date.
  - Contract signature: it is estimated that the first contracts related to this call will come into force after the summer of 2005.

## *Call Information for Marie Curie Outgoing International Fellowships for 2006*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Outgoing International Fellowships
4. **Call identifier:** <sup>74</sup>
5. **Date of publication**<sup>75</sup>: 20 July 2005
6. **Closure date(s)**<sup>76</sup>: 18 January 2006 at 17.00 (Brussels local time)
7. **Total indicative budget:** €22.000.000
8. **Instruments:** see section 2.3.2.2 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.2.2 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.2.2 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** Two-step evaluation following a single proposal submission. The number of proposals passing to the second stage of evaluation will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.

<sup>71</sup> The call identifier shall be given in the published version of this call.

<sup>72</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>73</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

<sup>74</sup> The call identifier shall be given in the published version of this call.

<sup>75</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>76</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

#### 14. Indicative evaluation and contractual timetable:

- Provisional evaluation results: for the first step estimated to be available in April 2006 and results of the second step are estimated to be available within some 6 months after the closure date.
- Contract signature: it is estimated that the contracts related to this call will come into force after the summer of 2006.

#### *Call Information for Marie Curie Incoming International Fellowships for 2005*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Incoming International Fellowships
4. **Call identifier:**<sup>77</sup>
5. **Date of publication**<sup>78</sup>: 28 September 2004
6. **Closure date(s)**<sup>79</sup>: 19 January 2005 at 17.00 (Brussels local time)
7. **Total indicative budget:** €20.000.000
8. **Instruments:** see section 2.3.2.3 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.2.3 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.2.3 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** Two-step evaluation following a single proposal submission. The number of proposals passing to the second stage of evaluation will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: for the first step estimated to be available in April 2005 and results of the second step are estimated to be available within some 6 months after the closure date.
  - Contract signature: it is estimated that the first contracts related to this call will come into force after the summer of 2005.

#### *Call Information for Marie Curie Incoming International Fellowships for 2006*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Incoming International Fellowships
4. **Call identifier:**<sup>80</sup>
5. **Date of publication**<sup>81</sup>: 20 July 2005
6. **Closure date(s)**<sup>82</sup>: 18 January 2006 at 17.00 (Brussels local time)
7. **Total indicative budget:** €22.000.000
8. **Instruments:** see section 2.3.2.3 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.2.3 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.2.3 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.

<sup>77</sup> The call identifier shall be given in the published version of this call.

<sup>78</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>79</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly.

<sup>80</sup> The call identifier shall be given in the published version of this call.

<sup>81</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>82</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

12. **Evaluation procedure:** Two-step evaluation following a single proposal submission. The number of proposals passing to the second stage of evaluation will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.

13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.

14. **Indicative evaluation and contractual timetable:**

- Provisional evaluation results: for the first stage estimated to be available in April 2006 and results of the second stage are estimated to be available within some 6 months after the closure date.
- Contract signature: it is estimated that the contracts related to this call will come into force after the summer of 2006.

### *Call Information for Marie Curie Excellence Grants for 2005*

1. **Specific Programme:** “Structuring the European Research Area”

2. **Activity:** Human resources and mobility activities

3. **Call title:** Call for proposals for Marie Curie Excellence Grants

4. **Call identifier:**<sup>83</sup>

5. **Date of publication**<sup>84</sup>: 28 September 2004

6. **Closure date(s)**<sup>85</sup>: 16 February 2005 at 17.00 (Brussels local time)

7. **Total indicative budget:** €40.000.000

8. **Instruments:** see section 2.3.3.1 of the work programme

9. **Minimum number of participants:** see the conditions specified in sections 2.3.3.1 of the work programme

10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.3.1 and 2.5 of the work programme

11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.

12. **Evaluation procedure:** Two-step evaluation following a single proposal submission. The number of proposals passing to the second stage of evaluation will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.

13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.

14. **Indicative evaluation and contractual timetable:**

- Provisional evaluation results: for the first step estimated to be available in May 2005 and results of the second step are estimated to be available within some 6 months after the closure date.
- Contract signature: it is estimated that the first contracts related to this call will come into force after the summer of 2005.

### *Call Information for Marie Curie Excellence Grants for 2006*

1. **Specific Programme:** “Structuring the European Research Area”

2. **Activity:** Human resources and mobility activities

3. **Call title:** Call for proposals for Marie Curie Excellence Grants

4. **Call identifier:**<sup>86</sup>

5. **Date of publication**<sup>87</sup>: 20 July 2005.

6. **Closure dates**<sup>88</sup>: 15 February 2006 at 17.00 (Brussels local time)

7. **Total indicative budget:** €45.000.000

<sup>83</sup> The call identifier shall be given in the published version of this call.

<sup>84</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>85</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

<sup>86</sup> The call identifier shall be given in the published version of this call.

<sup>87</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>88</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

8. **Instruments:** see section 2.3.3.1 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.3.1 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.3.1 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** Two-step evaluation following a single proposal submission. The number of proposals passing to the second stage of evaluation will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: for the first step estimated to be available in May 2006 and results of the second step are estimated to be available within some 6 months after the closure date.
  - Contract signature: it is estimated that the contracts related to this call will come into force after the summer of 2006.

### *Call Information for Marie Curie Excellence Awards for 2005*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Excellence Awards
4. **Call identifier:** <sup>89</sup>
5. **Date of publication**<sup>90</sup>: 28 September 2004
6. **Closure date(s)**<sup>91</sup>: for nominations 16 February 2005 at 17.00 (Brussels local time)
7. **Total indicative budget:** €250.000
8. **Instruments:** see section 2.3.3.2 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.3.2 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.3.2 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** The evaluation shall follow a single stage submission; and Proposals will not be evaluated anonymously. Evaluation by panels of experts from the scientific fields and then by Grand Jury.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: estimated to be available within some 4 months after the closure date
  - Contract signature: it is estimated that the first contracts related to this call will come into force in the summer of 2005.

### *Call Information for Marie Curie Excellence Awards for 2006*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Excellence Awards
4. **Call identifier:** <sup>92</sup>

<sup>89</sup> The call identifier shall be given in the published version of this call.

<sup>90</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>91</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

<sup>92</sup> The call identifier shall be given in the published version of this call.

5. **Date of publication**<sup>93</sup>: 20 July 2005
6. **Closure dates**<sup>94</sup>: for nominations 15 February 2006 at 17.00 (Brussels local time)
7. **Total indicative budget**: €250.000
8. **Instruments**: see section 2.3.3.2 of the work programme
9. **Minimum number of participants**: see the conditions specified in sections 2.3.3.2 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.3.2 and 2.5 of the work programme
11. **Consortia agreements**: Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure**: The evaluation shall follow a single stage submission; and Proposals will not be evaluated anonymously. Evaluation by panels of experts from the scientific fields and then by Grand Jury.
13. **Evaluation criteria**: See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable**:
  - Provisional evaluation results: estimated to be available within some 4 months after the closure date
  - Contract signature: it is estimated that the first contracts related to this call will come into force in the summer of 2006.

### *Call Information for Marie Curie Chairs for 2005*

1. **Specific Programme**: “Structuring the European Research Area”
2. **Activity**: Human resources and mobility activities
3. **Call title**: Call for proposals for Marie Curie Chairs
4. **Call identifier**:<sup>95</sup>
5. **Date of publication**<sup>96</sup>: 28 September 2004
6. **Closure date(s)**<sup>97</sup>: 16 February 2005 at 17.00 (Brussels local time)
7. **Total indicative budget**: €8.000.000
8. **Instruments**: see section 2.3.3.3 of the work programme
9. **Minimum number of participants**: see the conditions specified in sections 2.3.3.3 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.3.3 and 2.5 of the work programme
11. **Consortia agreements**: Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure**: Two-step evaluation following a single proposal submission. The number of proposals passing to the second stage of evaluation will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria**: See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable**:
  - Provisional evaluation results: for the first step estimated to be available in May 2005 and results of the second step are estimated to be available within some 6 months after the closure date
  - Contract signature: it is estimated that the first contracts related to this call will come into force in the summer of 2005

<sup>93</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>94</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

<sup>95</sup> The call identifier shall be given in the published version of this call.

<sup>96</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>97</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

## *Call Information for Marie Curie Chairs for 2006*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie Chairs
4. **Call identifier:**<sup>98</sup>
5. **Date of publication**<sup>99</sup>: 20 July 2005
6. **Closure date(s)**<sup>100</sup>: 15 February 2006 at 17.00 (Brussels local time)
7. **Total indicative budget:** €10.000.000,
8. **Instruments:** see section 2.3.3.3 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.3.3 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.3.3 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** Two-step evaluation following a single proposal submission. The number of proposals passing to the second stage of evaluation will be determined as a multiple of the number of proposals expected to be financed for the call as described in the Guidelines for Proposal Evaluation and Selection Procedures. The relevant multiple will be 2.5; and Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable:**
  - Provisional evaluation results: for the first step estimated to be available in May 2006 and results of the second step are estimated to be available within some 6 months after the closure date
  - Contract signature: it is estimated that the first contracts related to this call will come into force in the summer of 2006

## *Call Information for Marie Curie European Reintegration Grants for 2003 and 2004*

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for Marie Curie European Reintegration Grants
4. **Call identifier:**<sup>101</sup>
5. **Date of publication**<sup>102</sup>: 17 December 2002
6. **Closure dates**<sup>103</sup>: Open call with closure dates on 15 April 2003, 15 July 2003, 15 October 2003, 15 January 2004, 15 April 2004, 15 July 2004 and 14 October 2004, at 17.00 (Brussels local time). Proposals received shall be evaluated in batches.
7. **Total indicative budget:** €20.000.000 (*of which approximately 1/3 for each closure date*) in 2003 and €19.000.000 (*of which approximately 1/4 for each closure date*) in 2004
8. **Instruments:** see section 2.3.4.1 of the work programme
9. **Minimum number of participants:** see the conditions specified in sections 2.3.4.1 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.4.1 and 2.5 of the work programme
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** The evaluation shall follow a single stage submission. Proposals will not be evaluated anonymously. Proposals will be evaluated continuously upon reception and will be selected in batches following the closures dates.

<sup>98</sup> The call identifier shall be given in the published version of this call.

<sup>99</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>100</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

<sup>101</sup> The call identifier shall be given in the published version of this call.

<sup>102</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>103</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.

14. **Indicative evaluation and contractual timetable:**

- Provisional evaluation results: estimated to be within some 3 months after the closure date
- Contract signature: it is estimated that the first contracts related to this call will come into force before the end of 2003.

*Call Information for Marie Curie European Reintegration Grants for 2005 and 2006*

1. **Specific Programme:** “Structuring the European Research Area”

2. **Activity:** Human resources and mobility activities

3. **Call title:** Call for proposals for Marie Curie European Reintegration Grants

4. **Call identifier:** <sup>104</sup>

5. **Date of publication**<sup>105</sup>: 28 September 2004

6. **Closure dates**<sup>106</sup>: Open call with closure dates on 19 January 2005, 19 April 2005, 19 July 2005, 19 October 2005, 19 January 2006, 19 April 2006 and 19 July 2006, at 17.00 (Brussels local time). Proposals received shall be evaluated in batches. Researchers who under the eligibility rules described elsewhere in this document would have been eligible to submit a proposal under this action between 15 July 2006 and 31 December 2006, are eligible to apply for the July 2006 closure date.

7. **Total indicative budget:** € 10.000.000 (of which approximately 1/4 for each closure date) in 2005 and € 13.000.000 (of which approximately 1/4 for each of the first two closure dates and approximately 1/2 for the last) in 2006

8. **Instruments:** see section 2.3.4.1 of the work programme

9. **Minimum number of participants:** see the conditions specified in sections 2.3.4.1 of the work programme

10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.4.1 and 2.5 of the work programme

11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.

12. **Evaluation procedure:** The evaluation shall follow a single stage submission. Proposals will not be evaluated anonymously. Proposals will be evaluated continuously upon reception and will be selected in batches following the closures dates.

13. **Evaluation criteria:** See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.

14. **Indicative evaluation and contractual timetable:**

- Provisional evaluation results: estimated to be within some 3 months after the closure date
- Contract signature: it is estimated that the first contracts related to this call will come into force in the first half of 2005.

*Call Information for Marie Curie International Reintegration Grants for 2003 and 2004*

1. **Specific Programme:** “Structuring the European Research Area”

2. **Activity:** Human resources and mobility activities

3. **Call title:** Call for proposals for Marie Curie International Reintegration Grants

4. **Call identifier:** <sup>107</sup>

5. **Date of publication**<sup>108</sup>: 17 December 2002

<sup>104</sup> The call identifier shall be given in the published version of this call.

<sup>105</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>106</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

<sup>107</sup> The call identifier shall be given in the published version of this call.

<sup>108</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

6. **Closure dates**<sup>109</sup>: Open call with closure dates on 15 April 2003, 15 July 2003, 15 October 2003, 15 January 2004, 15 April 2004, 15 July 2004 and 14 October 2004 at 17.00 (Brussels local time). Proposals received shall be evaluated in batches.
7. **Total indicative budget**: € 7.000.000 (of which approximately 1/3 for each closure date) in 2003 and € 10.000.000 (of which approximately 1/4 for each closure date) in 2004.
8. **Instruments**: see section 2.3.4.2 of the work programme
9. **Minimum number of participants**: see the conditions specified in sections 2.3.4.2 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.4.2 and 2.5 of the work programme
11. **Consortia agreements**: Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure**: The evaluation shall follow a single stage submission. Proposals will not be evaluated anonymously. Proposals will be evaluated continuously upon reception and will be selected in batches following the closures dates.
13. **Evaluation criteria**: See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable**:
  - Provisional evaluation results: estimated to be within some 3 months after the closure date
  - Contract signature: it is estimated that the first contracts related to this call will come into force before the end of 2003

### ***Call Information for Marie Curie International Reintegration Grants for 2005 and 2006***

1. **Specific Programme**: “Structuring the European Research Area”
2. **Activity**: Human resources and mobility activities
3. **Call title**: Call for proposals for Marie Curie International Reintegration Grants
4. **Call identifier**:<sup>110</sup>
5. **Date of publication**<sup>111</sup>: 28 September 2004
6. **Closure date**<sup>112</sup>: Open call with closure dates on 19 January 2005, 19 April 2005, 19 July 2005, 19 October 2005, 19 January 2006, 19 April 2006 and 19 July 2006 at 17.00 (Brussels local time). Proposals received shall be evaluated in batches. Proposals received shall be evaluated in batches. Researchers who under the eligibility rules described elsewhere in this document would have been eligible to submit a proposal under this action between 19 July 2006 and 31 December 2006, are eligible to apply for the July 2006 closure date.
7. **Total indicative budget**: € 10.000.000 (of which approximately 1/4 for each closure date) in 2005 and € 13.000.000 (of which approximately 1/4 for each of the first two closure dates and approximately 1/2 for the last) in 2006.
8. **Instruments**: see section 2.3.4.2 of the work programme
9. **Minimum number of participants**: see the conditions specified in sections 2.3.4.2 of the work programme
10. **Restrictions to participation** (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.4.2 and 2.5 of the work programme
11. **Consortia agreements**: Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure**: The evaluation shall follow a single stage submission. Proposals will not be evaluated anonymously. Proposals will be evaluated continuously upon reception and will be selected in batches following the closures dates.
13. **Evaluation criteria**: See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. **Indicative evaluation and contractual timetable**:
  - Provisional evaluation results: estimated to be within some 3 months after the closure date

<sup>109</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

<sup>110</sup> The call identifier shall be given in the published version of this call.

<sup>111</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>112</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

- **Contract signature:** it is estimated that the first contracts related to this call will come into force in the first half of 2005.

### ***Call Information for the Researchers in Europe Initiative***

1. **Specific Programme:** “Structuring the European Research Area”
2. **Activity:** Human resources and mobility activities
3. **Call title:** Call for proposals for the Researchers in Europe Initiative
4. **Call identifier:** <sup>113</sup>
5. **Date of publication** <sup>114</sup>: 11 September 2004
6. **Closure dates** <sup>115</sup>: 2 December 2004 at 17.00 (Brussels local time)
7. **Total indicative budget:** €3 000 000
8. **Instrument:** Specific Support Action
9. **Minimum number of participants:** one legal entity
10. **Restrictions to participation:** none
11. **Consortia agreements:** Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. **Evaluation procedure:** The evaluation shall follow a single stage submission. Proposals will not be evaluated anonymously.
13. **Evaluation criteria:** See Annex B of the work programme for the specific programme for research, technological development and demonstration: “Structuring the European Research Area” for the applicable criteria (including their individual weights and thresholds and the overall threshold)
14. **Indicative evaluation and contractual timetable:**
  - **Provisional evaluation results:** estimated to be within some 3 months after the closure date
  - **Contract signature:** it is estimated that the first contracts related to this call will come into force six months after the closing date

<sup>113</sup> The call identifier shall be given in the published version of this call.

<sup>114</sup> The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.

<sup>115</sup> When the envisaged publication date is advanced or delayed (see previous footnote), the closure date(s) may be adjusted accordingly, if needed.

## 2.8. Community contribution and specific applicable rates

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 unitary amounts according to rates for certain expenses.

The Community contribution should be 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.

### 2.8.1 Rates applicable to the “Marie Curie” Actions

**Table 1. Reference rates for monthly living allowances (cost of living index 100)<sup>116</sup>**

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

Categories	A. Researchers recruited under an employment contract/ fellowship with full social security coverage (€year) <sup>117</sup>	B. Researchers receiving a fixed-amount fellowship with minimum social security coverage (€year) <sup>118</sup>
Early stage researchers	30 550	15 275
Experienced researchers (4-10 years experience) <sup>119</sup>	47 000	23 500
Experienced researchers <sup>120</sup> (>10 years experience)	70 500	35 250

<sup>116</sup> Rates for individual countries are obtained by applying to these rates the correction factors for cost of living, as referred in Table 3.

<sup>117</sup> These monthly allowances include all compulsory deductions under national applicable legislation.

<sup>118</sup> 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 by the Commission 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, invalidity benefits. As to maternity 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 (according to the WP and the contractual documents), on request by the researchers and on advice/consultation of the host organisation, to augment the sum of the Community contribution as a consequence. This is the minimum standard of social security coverage required when a researcher is recruited under a fixed-amount fellowship, whether or not the country in which the project will be carried out has any regulations on this matter.

<sup>119</sup> + 30% with regards to the rates for the team leader of the *Marie Curie* Excellence Grants and for the chair holder of the *Marie Curie* Chairs.

<sup>120</sup> + 30% with regards to the rates for the team leader of the *Marie Curie* Excellence Grants and for the chair holder of the *Marie Curie* Chairs.

**Table 2. Travel allowances**

<b>Distance<sup>1</sup> (km)</b>	<b>Fixed-amount contribution (€)</b>
< 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

<sup>1</sup> Direct distance (as the crow flies) based on latitude and longitude between the two locations.

**Table 3. Correction Coefficients** <sup>121 122</sup>

Austria	104	Belgium	100	Cyprus	95,1	Czech Republic	92	Denmark	129,1
Estonia	74,3	Finland	115,9	France	104,7	Germany	103,8	Greece	87,6
Hungary	69	Ireland	108,2	Italy	99,3	Latvia	80,7	Lithuania	76,6
Luxemburg	100	Malta	103	Netherlands	103,9	Poland	88,7	Portugal	88,7
Slovakia	68,8	Slovenia	76,4	Spain	93,7	Sweden	110,7	United Kingdom	112,5
Bulgaria	72,1	Iceland	118,9	Israel	121,6	Norway	134,2	Romania	55,1
Switzerland	124,8	Turkey	81,3						
Albania	97,3	Angola	115,9	Argentina	129,4	Australia	93,9	Bangladesh	77,9
Barbados	142,5	Belize	103,2	Benin	88,4	Bolivia	74,3	Bosnia and Herzegovina	87,5
Botswana	55,4	Brazil	82,4	Burkina Faso	78,5	Cameroon	96,1	Canada	84,5
Cape Verde	75,6	Central African Republic	109,8	Chad	112,5	Chile	86,2	China	107,3
Colombia	82,9	Congo	103,9	Costa Rica	104,7	Côte d'Ivoire	106,1	Croatia	97,3
Democratic Rep. of the Congo	144,9	Djibouti	141,8	Dominican Republic	92,4	Egypt	73,4	Equatorial Guinea	95,8
Eritrea	46,3	Ethiopia	80,2	Fiji	71,1	FYROM	77,5	Gabon	116,1
Georgia	111,2	Ghana	89,5	Guatemala	93,8	Guinea	87,1	Guinea-Bissau	132,2
Guyana	70,7	Haiti	98,4	Hong Kong	121,9	India	61,2	Indonesia	88,5
Jamaica	126,4	Japan	161,3	Jordan	99,2	Kazakhstan	117,9	Kenya	98,5
Lebanon	110,9	Lesotho	44,1	Madagascar	96,1	Malawi	105	Mali	86,6
Mauritania	72,8	Mauritius	84,5	Mexico	102,4	Morocco	89,6	Mozambique	81,7
Namibia	48,4	Netherlands Antilles	121	New Caledonia	122,2	Nicaragua	99,4	Niger	87,7
Nigeria	102,7	Pakistan	59,3	Papua New Guinea	68,3	Peru	112,4	Philippines	68,7
Russia	133,6	São Tomé and Príncipe	74,4	Senegal	81,5	Solomon Islands	97,2	South Africa	41,9
South Korea	108,3	Sri Lanka	77,8	Sudan	48	Surinam	81,5	Swaziland	42,3
Syria	108,4	Tanzania	80,9	Thailand	70,9	The Comoros	103,3	The Gambia	60,5
Togo	96,3	Tonga	72,7	Trinidad and Tobago	90,7	Tunisia	83,6	Uganda	99,2
Ukraine	123,9	United States	132,5	Uruguay	109,3	Vanuata	121,9	Venezuela	115,6
Vietnam	68,9	West Bank and Gaza Strip	112,9	Serbia and Montenegro	63,6	Zambia	66	Zimbabwe	88,5

<sup>121</sup> These rates are based on the correction coefficients used for EC civil servants working in these countries.<sup>122</sup> For those countries where the correction coefficient is not available (not indicated in the table), the Commission will decide on a case by case basis.

## 2.8.2 Structure of the Community contribution

Marie Curie Actions	Eligible expenses <sup>123</sup>								
	Eligible expenses for the activities carried out by the researchers <sup>124</sup>					Eligible expenses for the activities carried out by the host organisations			
	- A - Monthly living allowance <sup>125</sup>	Transnational mobility - B - <sup>126</sup> - C - <sup>127</sup> Travel Allowance      Mobility Allowance		- D - Career exploratory allowance <sup>128</sup>	- E - Contribution to the participation expenses of eligible researchers	- F - Contribution to the research/training /transfer of knowledge programme expenses	- G - Management activities (including audit certification)	- H - Contribution to overheads <sup>129</sup>	- I - Other types of eligible expenses / specific conditions
Marie Curie host fellowships for early stage research training	Application of the Marie Curie reference rates (cf. point 2.8)	X (see point 2.8.1)	X	X	Contribution managed by the hosting organisations for expenses related to the participation of eligible researchers to research and training activities (meetings, conference attendance, training actions, research costs, etc ):  Following a fixed amount scheme : 250 €per researcher-month for non laboratory based research training projects ; 500 €per researcher-month for laboratory based research training projects	1 – Contribution to the host organisation for the execution of the training project (publication of vacant positions, training actions, teaching material, etc): real expenses with a maximum of 250 € per researcher month  <b>Only for multi-partner sites :</b>  2 - Contribution to the expenses related to the co-ordination between participants (meetings, conferences, joint training actions, detachment of staff, etc ) : real expenses with a maximum of 250 €per researcher-month	maximum 3 % of the total Community contribution	10 % of direct costs except for subcontractors.	N/A

<sup>123</sup> The following activities are considered necessary by their nature to achieve to objectives of each of the Marie Curie actions and can be the subject of Community funding within the conditions foreseen. These conditions are indicated in general terms in footnotes at the bottom of the pages. Special cases or exceptions applicable for each action are indicated directly in this table.

<sup>124</sup> The expenses A, B, C and D are for the benefit of the eligible researchers. The expenses E are expenses for the training activities carried out by the researchers.

<sup>125</sup> Allowance for fellows/month based on reference rates as mentioned in table 1 point 2.8.1.

<sup>126</sup> Travel allowance / Fellow based on the direct distance (as the crow flies) 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.

<sup>127</sup> Mobility allowance / month: fixed amount (relocation, family charges, language courses, ...): 800 €to cover supplementary expenses linked to the family situation of the researcher (marriage or equivalent status recognised by national legislation of the country of the host, and/or charge of children); 500 €for a researcher without family charges . The measuring point for the family situation is “at the time of recruitment” in case of host driven actions and “at the time of the Commission selection decision on the proposal” for individual driven actions. In the Excellence actions the family situation is determined “at the time of the Commission selection decision on the proposal” for Chair holders and Team leaders and “at the time of recruitment” for Team members. To these amounts a correction factor for the cost of living of the country of execution of the project is applied. This allocation will only be due for researchers doing a transnational mobility.

<sup>128</sup> €2000/fellow: only for fellows selected for stays of at least one year.

<sup>129</sup> C(2003) 799 of 17.03.2003, Communication to the Commission establishing a contract type in the frame of the implementation of the Sixth Framework Programme of the European Community (2002-2006)

Marie Curie Actions	Eligible expenses								
	Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
	- A - Monthly living allowance	Transnational mobility		- D - Career exploratory allowance	- E - Contribution to the participation expenses of eligible researchers	- F - Contribution to the research/ training /transfer of knowledge programme expenses	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
	B Travel Allowance	-C Mobility Allowance							
<b>Training Networks</b>	Application of the Marie Curie reference rates (cf. point 2.8)	X	X	X	Host institute manages the financial contribution to expenses incurred by eligible researchers participating in networking, training and knowledge transfer activities (meetings, conferences training actions, secondments). (Provisional budget calculated on the basis of 400 Euro per eligible researcher-month; Payment on the basis of actual expenditure) At least <b>65%</b> of the Community contribution must be spent on cost categories A, B, C, D and E.	1 – Contribution to costs linked to the participation of researchers not recruited by the Network in networking activities, in training and transfer of knowledge (network meetings, conferences, training actions, secondments,...):  - actual cost  2 – Contribution to the organisation and the implementation of the project (research costs linked to the training of researchers recruited by the network, publication of vacant posts, establishment and maintenance of a web site, exchange of information and of materials,...):  - actual cost	* Up to 7% of the Community contribution	10% of direct costs excluding sub-contracts	<b>Equipment expenses</b> if : - necessary for the project - duly justified on basis of real costs - and with prior agreement of the Commission (partial depreciation, or total if indispensable, if justified by the use of the goods and if final destination of goods is determined)

Marie Curie Actions	Eligible expenses								
	Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
	- A - Monthly living allowance	Transnational mobility		- D - Career exploratory allowance	- E - Contribution to the participation expenses of eligible researchers	- F - Contribution to the research/ training /transfer of knowledge programme expenses	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
	B Travel	-C Mobility Allowances							
Series of Conferences	Subsistence expenses : Real expenses up to a maximum of 150 €per day, with application of correction coefficient (cf. point 2.8)	real expenses up to a maximum of the reference rates (cf. point 2.8) (no transnational mobility required for this action)	N/A	N/A	- Participation fees of Eligible researchers	<p><b>* Organisational expenses, in particular :</b></p> <ul style="list-style-type: none"> <li>- Invitation of keynote speakers</li> <li>- Publication</li> <li>- rental of premises</li> <li>- webcasting</li> </ul> <p>* Lump sum as a fraction of total organisational costs on the basis of the number of eligible attendees supported by the participant(s)</p>	maximum 7 % of the Community contribution	N/A	<b>equipment expenses</b> if : - necessary for the project - duly justified on basis of real costs - and with prior agreement of the Commission (partial depreciation, or total if indispensable, if justified by the use of the goods and if final destination of goods is determined)
					-				

Marie Curie Actions		Eligible expenses								
		Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
		- A - Monthly living allowance	Transnational mobility		- D - Career explorer y allowance	- E - Contribution to the participation expenses of eligible researchers	- F - Contribution to the research/ training /transfer of knowledge programme expenses	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
	B	-C								
	Travel	Mobility	Allowances							
Marie Curie host fellowships for the transfer of knowledge	Development scheme	For staff member sent outside only :  Application of the Marie Curie reference rates (cf. point 2.8)	X	X	N/A	N/A	Reimbursement of specific expenses related to the training of researchers in the partner organisation (training expenses, laboratory expenses, etc) ; if necessary and within the limit of real expenses of 800 €researcher-month	maximum 3 % of the total Community contribution	10 % of direct costs except for subcontractors.	<b>Equipment expenses</b> if : - necessary for the project - duly justified on basis of real costs - and with prior agreement of the Commission (partial depreciation, or total if indispensable, if justified by the use of the goods and if final destination of goods is determined)
		For experienced researchers hosted :  Application of the Marie Curie reference rates (cf. point 2.8)	X	X	X	N/A				
	For reintegrated researchers:  No contribution	N/A	N/A	N/A	N/A	<b>Contribution to expenses related to the project (including equipment costs) :</b>  <u>Option to choose by the participant:</u>  - either following a fixed amount scheme : 250 €per researcher-month for non laboratory based research projects ; 500 €per researcher-month for laboratory based research projects  - or real expenses with a maximum of 1200 €per researcher -month				
Marie Curie Industry-Academia Strategic Partnership Scheme	Application of the Marie Curie reference rates (cf. point 2.8)	X	X	N/A	N/A	<b>Contribution to expenses related to the project</b>  <u>Option to be chosen by the participant:</u>  - either following a fixed amount scheme : 250 €per researcher-month for non laboratory based research projects; 500 €per researcher-month for laboratory based research projects  - or real expenses with a maximum of 800 €per researcher -month				

Marie Curie Actions		Eligible expenses								
		Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
		- A - Monthly living allowance	Transnational mobility		- D - Career exploratory allowance	- E - Contribution to the participation expenses of eligible researchers	- F - Contribution to the research/training /transfer of knowledge programme expenses	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
	B Travel Allowance	C Mobility Allowance								
<b>Marie Curie intra-European fellowships</b>		Application of the Marie Curie reference rates (cf. point 2.8)	X	X	X	Contribution managed by the hosting organisations for expenses related to the participation of eligible researchers to research and training activities (meetings, conference attendance, training actions, research costs, etc):  Following a fixed amount scheme : 500 €per researcher- month for non laboratory based research training projects ; 750 € per researcher-month for laboratory based research training projects	N/A	maximum of 3 % of the Community contribution	10% of direct costs except for subcontractors	N/A
<b>Marie Curie incoming international fellowships</b>	Incoming phase	Application of the Marie Curie reference rates (cf. point 2.8)	X	X	N/A	Contribution, managed by the host organisation, to the expenses linked to the participation of the eligible researchers in the research and training activities (meetings, conferences, training activities, research expenses etc.) according to standard rates (per researcher-month :500€if not attached to a laboratory, 750€if attached to a laboratory)	N/A	Maximum 3 % of the Community contribution	10% of the direct costs apart from any sub-contracts	N/A
	Possible reintegration phase	N/A	N/A	N/A	N/A	<b>Real costs necessary for the project: Remuneration of the beneficiary researcher (up to 100% of real cost with a ceiling limit of 3000 per month), other personnel, equipment, consumables, etc</b>				N/A

Marie Curie Actions		Eligible expenses								
		Eligible expenses for the activities carried out by the researchers				Eligible expenses for the activities carried out by the host organisations				
		- A - Monthly living allowance	Transnational mobility		- D - Career exploratory allowance	- E - Contribution to the participation expenses of eligible researchers	- F - Contribution to the research/training /transfer of knowledge programme expenses	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
	B	C								
		Travel Allowances	Mobility Allowances							
Marie Curie outgoing international fellowships	Outgoing phase (third countries)	Application of the Marie Curie reference rates (cf. point 2-8)	X	X	N/A	Only reimbursement of possible expenses related to the training of researchers in a third country (inscription fees, laboratory costs, etc) ; if necessary and within a maximum of real expenses of 750 €/researchers-month	N/A	maximum 3% of the Community contribution	10% of the direct costs apart from sub-contracting	N/A
	Reintegration phase	Application of the Marie Curie reference rates (cf. point 2-8)  Reintegration Phase	X	not applicable in the case of reintegration in the researcher's country of origin		Contribution, managed by the host institute, to the expenses linked to the participation of the eligible researchers in the research and training activities (meetings, conferences, training activities, research expenses etc.) according to standard rates (per researcher-month :500€if not attached to a laboratory, 750€if attached to a laboratory)	N/A		10% of the direct costs apart from sub-contracting	N/A

Marie Curie Actions	Eligible expenses								
	Eligible expenses for the activities carried out by the researchers					Eligible expenses for the activities carried out by the host organisations			
	- A - Monthly living allowance	Transnational mobility <hr/> B - C Travel Mobility Allowances		- D - Career exploratory allowance	- E - Contribution to the participation expenses of eligible researchers	- F - Contribution to the research/ training /transfer of knowledge programme expenses	- G - Management activities (including audit certification)	- H - Contribution to overheads	- I - Other types of eligible expenses / specific conditions
<b>Marie Curie Excellence Grants</b>	Application of the Marie Curie reference rates (cf. point 2.8)  At least 65% of the Community contribution must be spent on cost categories A, B and C.	X	X	N/A	N/A	Real expenses	maximum 3 % of the Community contribution	10 % of additional direct costs (except sub-contracting)	<b>Possibly equipment expenses</b> if : - necessary for the project - duly justified on basis of real costs - and with prior agreement of the Commission (partial depreciation, or total if indispensable, if justified by the use of the goods and if final destination of goods is determined)
<b>Marie Curie Chairs</b>	Application of the Marie Curie reference rates (cf. point 2.8)	X	X	N/A	N/A	Real expenses	maximum 3 % of the Community contribution	10 % of additional direct costs (except sub-contracting)	<b>Possibly equipment expenses</b> if : - necessary for the project - duly justified on basis of real costs - and with prior agreement of the Commission (partial depreciation, or total if indispensable, if justified by the use of the goods and if final destination of goods is determined)

Marie Curie Actions	Eligible expenses									
	Eligible expenses for the activities carried out by the researchers					Eligible expenses for the activities carried out by the host organisations				
	- A -	Transnational mobility		- D -	- E -	- F -	- G -	- H -	- I -	
Monthly living allowance	B Travel Allowance	- C Mobility Allowance	Career exploratory allowance	Contribution to the participation expenses of eligible researchers	Contribution to the research/training /transfer of knowledge programme expenses	Management activities (including audit certification)	Contribution to overheads	Other types of eligible expenses / specific conditions		
Marie Curie Excellence Awards	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Lump sum * Award holder is free to use Community contribution * Participation in events promoting the visibility of European research	
Marie Curie International Reintegration Grants	N/A	N/A	N/A	N/A	N/A	N/A	Maximum 3 % of the Community contribution	N/A	Amount up to 80 000 euros given subject to :  * a <u>proposal demonstrating that the estimated budget of the project is higher than this contribution</u>  * the <u>evidence that the results are achieved (i.e. effective reintegration) and that the actual expenses are higher than this amount</u>  <u>Ineligible expenses:</u> <u>remuneration of the eligible researcher</u>  Eligible expenses: All expenditure necessary for the project (on the basis of the reintegration project submitted by the proposer and approved by the Commission): personnel other than the eligible researcher, consumables, travel etc. <u>equipment expenses</u> if : - necessary for the project - duly justified on basis of real costs - and with prior agreement of the Commission (partial depreciation, or total if indispensable, if justified by the use of the goods and if final destination of goods is determined)	

<b>Marie Curie European Reintegration Grants</b>	N/A	N/A	N/A	N/A	N/A	N/A	Maximum of 3 % of the Community contribution	N/A	<p><u>Amount up to 40 000 euros given subject to :</u></p> <p><u>* a proposal demonstrating that the estimated budget of the project is higher than this contribution</u></p> <p><u>* the evidence that the results are achieved (i.e. effective reintegration) and that the actual expenses are higher than this amount</u></p> <p><u>Ineligible expenses:</u> remuneration of the eligible researcher, except when the return is to a Less Favoured Region or to a Candidate Country</p> <p><u>Eligible expenses :</u> all expenses necessary to carry out the project (on base of the reintegration project submitted by the proposer and as approved by the Commission) : cost of personnel other than the eligible researcher, the latter with exception to the eligible researcher returning to a Less Favoured Region or to a Candidate Country; costs, consumables, travel costs, etc.....</p> <p><u>equipment expenses</u> if :</p> <ul style="list-style-type: none"> <li>- necessary for the project</li> <li>- duly justified on basis of real costs</li> <li>- and with prior agreement of the Commission (partial depreciation, or total if indispensable, if justified by the use of the goods and if final destination of goods is determined)</li> </ul>
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### 2.8.3 Additional financial information

The “fellowship”, in the sense of the human resources and mobility activities, covers the following expenses (for a full-time devotion to the project) : monthly living allowance (including all compulsory deductions under national legislation in the context of the project), monthly mobility allowance for the costs of the stay outside the country of origin, monthly allowance for the training, transfer of knowledge or research expenses of the researchers, annual travel allowance, and one single career exploratory/development allowance (for researchers with stays of at least one year).

The host organisation receiving Community funding must pay to the selected researchers a minimum contribution according to the reference allowances specified above. The host organisation may pay a top up to the eligible researcher in order to complement this contribution.

The amount of this allowance has been established for Member States, Associated States and third countries, by taking into account the conditions necessary to attract the best researchers as well as the overall situation of researchers of a corresponding level in the host country. This sum includes the necessary expenses for adequate social security.

To take into account the cases of parental leave of absence the Commission can decide, on request by the researchers and on advice/consultation of the host organisation, to prolong the duration of the fellowship and augment the sum of the Community contribution as a consequence. 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 1 of the point 2.8.1 (Rates applicable to the “Marie Curie” Actions).

**The host organisation will:**

- receive a contribution to the training, transfer of knowledge or research expenses connected with the project, according to the details given above,
- be reimbursed on real basis for the management activities, including audit certification,
- be reimbursed on real basis for all other activities necessary for the implementation of the objective of the action,
- receive a contribution for overheads.

The specific conditions applicable for the eligibility of each type of expenses are described under the heading “Technical content and Implementation of specific Actions”, in the tables above and/or in the contracts.

## II. General Annexes to Human Resources and Mobility

### **Mob-A. Road Map of Calls for Proposals 2004-2006**

Type of actions covered by the call	Publication of call for proposals	Dead-line for reception of proposals	Estimated dates for conclusion of first contracts
Research Training Networks	September 2004	2 December 2004	after summer of 2005
	May 2005	08 September 2005	first half of 2006
Early Stage Training Fellowships	September 2004	15 December 2004	after summer 2005
Conferences and Training Courses	January 2005	18 May 2005	before end 2005
	January 2006	17 May 2006	before end 2006
Transfer of Knowledge fellowships	December 2004	18 May 2005	before end 2005
	July 2005	15 February 2006	after summer 2006
Intra-European Fellowships	September 2004	16 February 2005	after summer 2005
	July 2005	15 February 2006	after summer 2006
International Incoming Fellowships	September 2004	19 January 2005	after summer 2005
	July 2005	18 January 2006	after summer 2006
International Outgoing Fellowships	September 2004	19 January 2005	after summer 2005
	July 2005	18 January 2006	after summer 2006
Excellence Grants (Teams)	September 2004	16 February 2005	after summer 2005
	July 2005	15 February 2006	after summer 2006
Chairs	September 2004	16 February 2005	summer 2005
	July 2005	15 February 2006	summer 2006
Excellence Awards	September 2004	16 February 2005	summer 2005
	July 2005	15 February 2006	summer 2006
European Re-Integration Grants	December 2002	Continuous from 15 April 2003 to 14 October 2004	Continuous from September 2003
	September 2004	Continuous from 19 January 2005 to 19 July 2006	Continuous from June 2005
International Re-integration Grants	December 2002	Continuous from 15 April 2003 to 14 October 2004	Continuous from September 2003
	September 2004	Continuous from 19 January 2005 to 19 July 2006	Continuous from June 2005
Specific Support Action Researchers in Europe Initiative	September 2004	2 December 2004	first half 2005

## Mob-B. Evaluation criteria for evaluating proposals

<u>Research Training Networks</u>	<u>Early Stage Training</u>	<u>Transfer of Knowledge</u>	<u>Conferences &amp; Training Courses</u>	<u>Intra-European / International Fellowships</u>	<u>International and European Return + Re-integration Grants</u>	<u>Marie Curie Chairs</u>	<u>Marie Curie Excellence Grants</u>	<u>Marie Curie Excellence Awards</u>
<b>Scientific Quality of the collaborative Project</b>	<b>Scientific Quality of Research Training Area</b>	<b>Scientific Quality of Project</b>	<b>Scientific Quality of the Project</b>	<b>Scientific Quality of the Project</b>	<b>Scientific Quality of the Project</b>	<b>Scientific Quality of the Project</b>	<b>Scientific Quality of the Project</b>	<b>N/A</b>
For the deadline of November 2004 : Are the S&T objectives well specified , including in terms of interdisciplinary content and intersectorial issues	Scientific/technological quality of the training area. Timeliness and relevance of the research training area	Scientific/technological quality, timeliness and relevance of the project	Quality and originality of topics	Scientific/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal	Scientific/technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal	Importance and relevance of the scientific field	Scientific quality of the research programme including, leading edge or interdisciplinary character of the research	
For the 2005 deadline : Are the S&T objectives well specified , including in terms of inter/multi-disciplinary, intersectorial and /or fragmentation issues	Research methodology including any interdisciplinary and multidisciplinary aspects of the proposal	Research methodology of the project and interdisciplinary and multidisciplinary aspects of the proposal considered	Quality of content with regard to complementary skills, where appropriate	Research methodology	Research methodology	Quality of the teaching or research planned	Importance and relevance of the scientific content	
Is the joint collaborative research project of high scientific quality, realistic and well described	Originality and innovative nature of the training area	Originality/innovative aspects of the project	Coherence between events	Originality and innovative nature of the project and relationship to the 'state of the art' of research in the field	Originality and innovative nature of the project, and relationship to the 'state of the art' of research in the field	Leading edge or multi disciplinary nature of the research or teaching	Potential for promoting innovation	
Is the research methodology appropriate				Timeless and relevance of the project.	Timeliness and relevance of the project		Research methodology	
Is the project original and innovative. Does it demonstrate sound knowledge of the state-of-the-art								

RTN	EST	TOK	SCF	EIF / OIF / IIF	IRG / ERG	EXC	EXT	EXA
<b>Quality of the Training / Transfer of Knowledge (ToK) activities</b>	<b>Quality of the Training Activities/ Transfer of Knowledge</b>	<b>Quality of the Knowledge Transfer</b>	<b>Quality of Research Training</b>	<b>Quality of Research Training</b>	N/A	<b>Quality of Research Training</b>	N/A	N/A
Is the training / ToK programme precisely described, well articulated and consistent with the collaborative research project	Quality of the training programme including complementary training offered	Quality of the transfer of knowledge project	Quality of training	Clarity and quality of the research training objectives for the researcher		Quality of lecture series and thesis work to be supervised		
Does it address important and timely training / ToK needs (e.g. multidisciplinary, and intersectorial (both mandatory in 2004-call)). Is it adapted to the targeted researchers (ESR/ER)	Match and appropriateness of the proposed training for the targeted researchers	Relevance of the project with respect to achieving the declared knowledge transfer project	Contact building arrangements	Relevance and quality of additional scientific training offered, including acquisition of complementary skills				
Does it combine local specialist training with network-wide training / ToK activities	Benefit to the researchers of the training in the relevant field	Match of the targeted researchers' profile to the knowledge transfer project	Importance and relevance of the training					
Benefit to the researcher in terms of the acquisition of relevant complementary skills (e.g. Management, Communication, IPR, ethics, etc.)	Benefit to the researchers and host from new collaborations.							
	Mutual recognition of the training acquired by multipartner hosts (where appropriate)							

RTN	EST	TOK	SCF	EIF / OIF / IIF	IRG / ERG	EXC	EXT	EXA
Quality/Capacity of the Network Partnership	Quality/Capacity of the Host or Network Partnership	Quality of Host:	Quality of Host	Quality of Host:	Quality of Host	Quality of Host	Quality of Host	N/A
Has the network, collectively, the necessary expertise / facilities / infrastructures to achieve the project scientific objectives, and is the task distribution and schedule well thought out	Quality of the group/supervisors, and capacity of the hosts to provide mentoring/tutoring, specifically in early stage research training	Quality of the host in its current area of research	Quality and capabilities of the organisers	Scientific expertise in the field	Quality of host organisation, including adequacy of infrastructures/facilities.	Quality of receiving organisation.	Quality of receiving organisation.	
Have the partners the capacity to provide high quality training and appropriate tutoring to the requested ESRs	Quality of infrastructure/facilities	Quality and relevance of international/ intersectorial research collaborations	Quality of locations / infrastructures	Quality of the group/supervisors		Suitability of the administrative and logistical support offered by the host.	Synergies offered by the hosts with the proposed activities.	
Are the complementarities and synergies among partners in terms of research and training well exploited	Relevance of partnership composition for proposal objectives (where relevant)	Quality and adequacy of infrastructure / facilities		Expertise in training experienced researchers in the field and capacity to provide mentoring/tutoring				
Have the partners the experience of ToK and of international research collaboration in the area of the project	Potential to reinforce the training capacities of the host	Match between project and host's profile		Quality of infrastructure / facilities and International collaborations				
Is the size of the network commensurate with the research / training / ToK objectives	Quality of international collaborations	Capacity of the hosts to receive knowledge						
How essential is third country participation, if any, to achieve the objectives of the project								

RTN	EST	TOK	SCF	EIF / OIF / IIF	IRG / ERG	EXC	EXT	EXA
Quality of Researchers	Quality of Researchers	Quality of Researchers	Quality of Researchers	Quality of Researchers	Quality of the Researchers	Quality of the Researchers	Quality of the Researchers	Quality of the Researchers
N/A	N/A	N/A	N/A	Research experience	Research experience	Scientific and technological excellence of previous research	Potential to lead a team to reach a high level of excellence	Scientific and technological excellence of previous research
				Research results including patents, publications, teaching etc.	Scientific and technological quality of previous research (for ERG: during the Marie Curie Fellowship)	Quality of previous teaching, including for scientifically literate public audience	Scientific and technological excellence of previous research	Research results and achievements
				Independent thinking and leadership qualities	Independent thinking and leadership qualities	Experience with managing research and supervising thesis work	Level of international experience obtained	Significant contribution to progress of knowledge
				Match between the fellow's profile and project.	Match between the fellow's profile and project.	Ability of proposer to successfully carry out the proposed training and research	Experience with managing research	
				For intra-European fellowships: potential for reaching a position of professional maturity.			Ability of proposer to take on the responsibilities of the task and to successfully manage and carry out the proposed research	
				For intra-European and outgoing fellowships: potential to acquire new knowledge.				

RTN	EST	TOK	SCF	EIF / OIF / IIF	IRG / ERG	EXC	EXT	EXA
Management and Feasibility	Management and Feasibility	Management and Feasibility	Management and Feasibility	Management and Feasibility	Management and Feasibility	Management and Feasibility	Management and Feasibility	N/A
Are there detailed and appropriate plans for the overall management of the collaborative project (demarcation of responsibilities, rules for decision making, ...)	Practical arrangements for the implementation and management of the training, and where relevant between partners	Practical arrangements for the implementation and management of the transfer of knowledge project including ability to build upon knowledge transferred	Management of the (series of) events: feasibility and credibility of proposed plans, availability of necessary resources	Practical arrangements for the implementation and management of the scientific project,	Practical arrangements for the implementation and management of the fellowship	Feasibility of teaching or research plan	Arrangements for implementing and managing the activity described in the proposal	
Is there a clear recruitment strategy, based on competitive international recruitment and incorporating an equal opportunity policy	Recruitment strategy, including timetable, equal opportunity policy, etc	Recruitment/exchange strategy, including timetable, equal opportunity policy, etc	Publicity and dissemination incl. web-site/ internet forum	Feasibility and credibility of the project, including work plan	Feasibility and credibility of the project, including work plan	Dissemination to a wider public	Feasibility and credibility of proposed plans	
Is there provision for effective networking and dissemination of best practice among partners	Appropriate size of requested of training project with regard to the training capacity of the host	Feasibility and credibility of the project		Practical and administrative arrangements, and support for the hosting of the fellow			Availability of necessary resources	
Is there a strategy for the dissemination of results during and after completion of the project		Quality of the collaborative partnership (where relevant)					Quality of the dissemination plan	
		Appropriate size of requested fellowship project with regard to capacity of the host						

<b>RTN</b>	<b>EST</b>	<b>TOK</b>	<b>SCF</b>	<b>EIF / OIF / IIF</b>	<b>IRG / ERG</b>	<b>EXC</b>	<b>EXT</b>	<b>EXA</b>
<b>Added value and relevance to objectives</b>	<b>Added value and relevance to objectives</b>	<b>Added value and relevance to objectives</b>	<b>Added value and relevance to objectives</b>	<b>Added value and relevance to objectives</b>	<b>Added value and relevance to objectives</b>	<b>Added value and relevance to objectives</b>	<b>Added value and relevance to objectives</b>	<b>Added value and relevance to objectives</b>
Relevance of the proposal to one or more of the specific objectives of the action as specified in section 2.3.1.1 of this document and in particular for the 2004 November deadline as specified in the first two indents of that section	Relevance of the proposal to one or more of the specific objectives of the action - as specified in section 2.3.1.2 of this document	Relevance of the proposal to one or more of the specific objectives of the action - as specified in section 2.3.1.3 of this document	Relevance of the proposal to one or more of the specific objectives of the action - as specified in section 2.3.1.4 of this document	Relevance of the proposal to one or more of the specific objectives of the action - as specified in section 2.3.2.1; 2.3.2.2, and 2.3.2.3 for EIF,OIF and IIF respectively, of this document	Relevance of the proposal to one or more of the specific objectives of the action - as specified in section 2.3.4.1 (ERG) and 2.3.4.2 (IRG) of this document	Relevance of the proposal to one or more of the specific objectives of the action - as specified in section 2.3.3.3 of this document	Relevance of the proposal to one or more of the specific objectives of the action - as specified in section 2.3.3.1 of this document.	Relevance of the proposal to one or more of the specific objectives of the action - as specified in section 2.3.3.2 of this document
Anticipated impact of the proposed research, training and/or ToK programme on the career development of the recruited researchers	Structuring effects at the European level and if relevant extent to which other European policy objectives are met.	Structuring effects at the European level and if relevant extent to which other European policy objectives are met.	Relevance of themes in relation to European achievements and interest	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	Benefit to the career of the researcher from the period of re-integration and potential for long term professional integration and job stability of the researcher	Impact on level of training available across Europe.	National diversity of envisaged team	Impact on increasing the attractiveness of Europe for researchers
Anticipated impact of the proposed research, training and/or ToK programme on the partner organisations' capabilities in these domains, and in fostering longer term collaborations among them	Contribution to international recognition of research training and diploma recognition	Likelihood of the transfer of knowledge project to enhance European scientific excellence	Composition of audience and identity of speakers	Contribution to career development or re-establishment where relevant.	for international return and re-integration- Capacity to transfer acquired knowledge and developed lasting co-operation with the third country.	Long time effect of the appointment on the host capacity	Impact on prospective team leader's career	Impact on public understanding of science, and on promoting the concept of a European research career

RTN	EST	TOK	SCF	EIF / OIF / IIF	IRG / ERG	EXC	EXT	EXA
Extent to which other objectives of European policies and actions are met (e.g. structuring the European Research Area; attractiveness of science; European competitiveness; promoting women in science; cohesion and regional policy)	Match to the demand for researchers in the particular field, and contribution to gender balance	For development scheme : benefit to the host in knowledge transfer; long term capacity building and potential to reach an international level in the field	Benefit to the organisers in terms of increased capacity to train and host conferences	For international fellowships : potential for creating long term collaborations and mutually beneficial co-operation between Europe and the third country	For international return and re-integration : contribution to scientific excellence by attracting a first class researcher; prospect of successful long term re-integration	Potential to attract the younger generation to a scientific career and to achieve career continuity	Synergies built by carrying out the proposed research at a European level	Potential for social or economic benefits from the results achieved
Extent to which the proposal integrates research partners from Less Favoured Regions, New Member States and Associated Candidate Countries		For development scheme : extend to which knowledge is transferred to Community less favoured regions and associated candidate countries		For incoming fellowships : contribution to the socio-economic development of the Developing Countries or emerging and transition economies by transfer of knowledge and human capacity building (where appropriate)	For international return and re-integration : Contribution to European excellence and European competitiveness	Potential for synergies with the host or other initiatives.	Impact on increasing the attractiveness of Europe, and on promoting European research careers, in particular the contribution to reversing brain drain.	
Extent to which other objectives of European policies and actions are met (e.g. structuring the European Research Area; attractiveness of science; European competitiveness; intersectorial exchanges; promoting women in science; cohesion and regional policy)	Extent to which other objectives of European policies and actions are met (e.g. structuring the European Research Area; attractiveness of science; European competitiveness; intersectorial exchanges; promoting women in science; cohesion and regional policy)	Industry / academia-capacity to develop new intersectorial collaborations and to achieve lasting collaborations	Extent to which European policy objectives are met e.g. contribution to the European Research Area, attractiveness of science, effects on public understanding; improving gender balance, international activities	Extend to which the research contributes to the objectives of the European Research Area or other European policy objectives.		Contribution to the objectives of the European Research Area and other Community policies	Impact in the creation of excellent, transnational dynamic and stimulating focal points in Europe	
		For the Industry / academia scheme-Extend to which SMEs contribute to the project					Relevance of theme(s) in relation to European achievements and interests	

**Table 2 - Weightings and Thresholds for each criterion of the HRM activities**

Activity	Research Training Networks		Early Stage Training		Transfer of Knowledge		Intra European Fellowships		International incoming fellowships		International outgoing fellowships		International return and re-integration grants		European Return and re-integration grants		Conferences and Training Courses		Excellence Grants		Excellence Awards		Marie Curie Chairs		
	W	T	W	T	W	T	W	T	W	T	W	T	W	T	W	T	W	T	W	T	W	T	W	T	
<b>W=Weighting<sup>(1)</sup></b> <b>T= Threshold</b>																									
<b>Content of the Proposal / Project</b>	15 (50)	3	10 (30)	3	15	3	15 (30)	N/A	15 (30)	3	15 (30)	3	15	3	15	3	25	N/A	20 (40)	4	N/A	N/A	15 (30)	3	
<b>Training Activities / Transfer of Knowledge</b>	20 (50)	4	15 (70)	4	15	4	15	3	15	N/A	15	3	N/A	N/A	N/A	N/A	15	4	N/A	N/A	N/A	N/A	15	4	
<b>Quality of the Host</b>	15	N/A	25	N/A	15	N/A	15	N/A	15 <sup>(5)</sup>	N/A	15 <sup>(5)</sup>	N/A	15	N/A	15	N/A	10	N/A	10	N/A	N/A	N/A	10	N/A	
<b>Quality of the Researchers</b>	N/A	N/A	N/A	N/A	N/A	N/A	15 (70)	4	15 (70)	4	15 (70)	4	25	3	25	N/A	N/A	N/A	20 (60)	4	40 <sup>(3)</sup>	5 <sup>(3)</sup>	15 (70)	4	
<b>Management and Feasibility</b>	15	3	15	3	15	3	5	N/A	5	N/A	5	N/A	10	N/A	10	N/A	20	N/A	15	N/A	N/A	N/A	10	N/A	
<b>Added Value and Relevance to the Objectives</b>	35	N/A	35	N/A	40	N/A	35	N/A	35	N/A	35	N/A	35	N/A	35 <sup>(2)</sup>	3	30	N/A	35	N/A	60 <sup>(4)</sup>	N/A	35	N/A	

**Note 1: All activities will be subject to a threshold in the total score of 70%**

**Note 2: For 2 step evaluation, or 2 stage submission the criteria shaded will form the basis of the selection of the proposals retained for the second step or stage (weighting in parenthesis where applicable)**

<sup>1)</sup> W = Weighting expressed as a percentage, T = Threshold score out of 5

<sup>2)</sup> Researchers applying for a European Return and Re-integration fellowship will be awarded the maximum mark for Added Value and Relevance to the Objectives if returning to the country of their nationality;

<sup>3)</sup> Evaluation by scientific experts in the discipline;

<sup>4)</sup> Evaluation by the Grand Jury;

<sup>5)</sup> This weighting will be split, when appropriate, between the 3<sup>rd</sup> country institution and the European host.