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**Unit P2 International Fellowships**

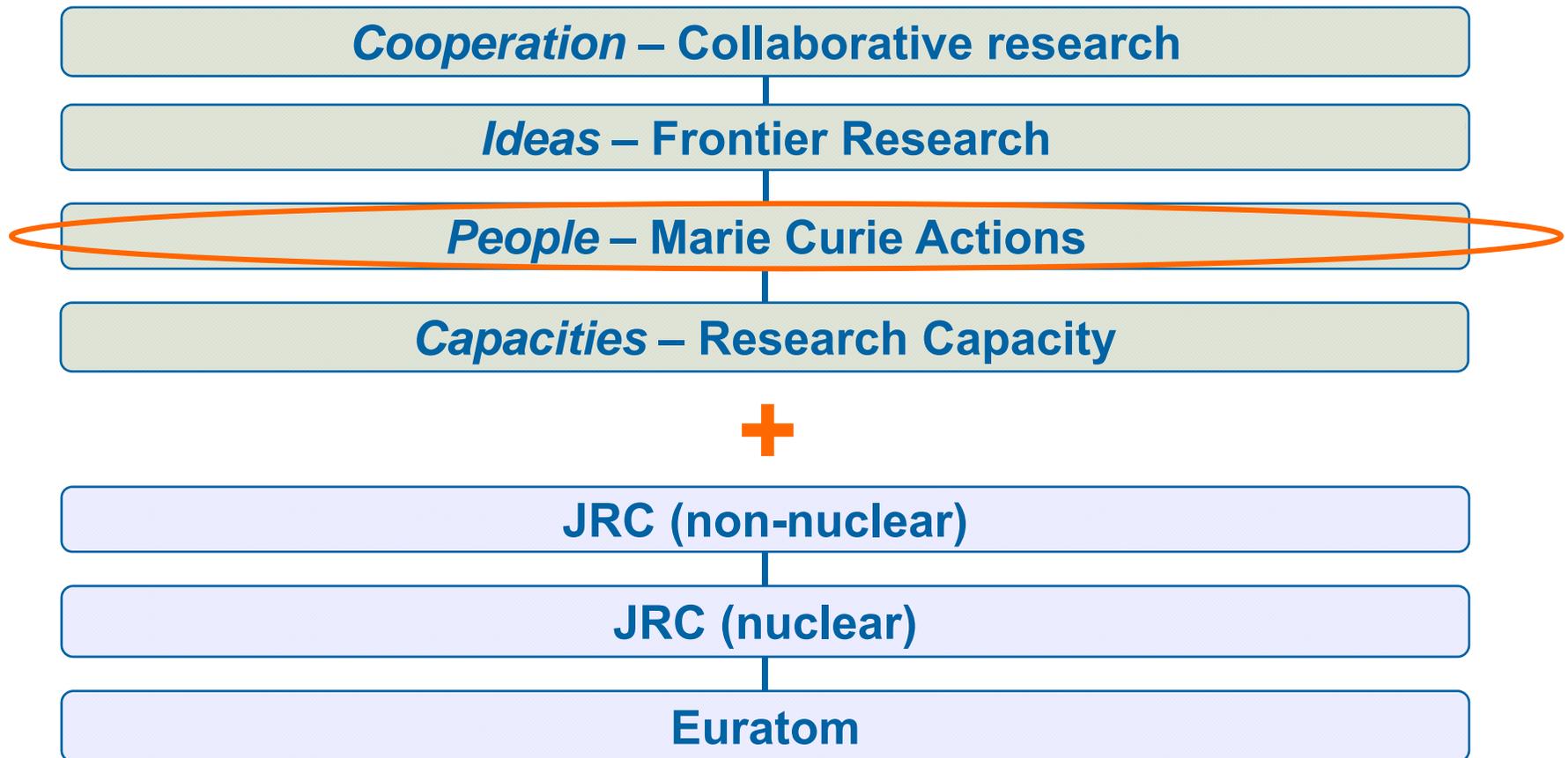
# **Marie Curie Individual Fellowships**

**MARIE CURIE ACTIONS ROAD SHOW**

**23 February 2011**

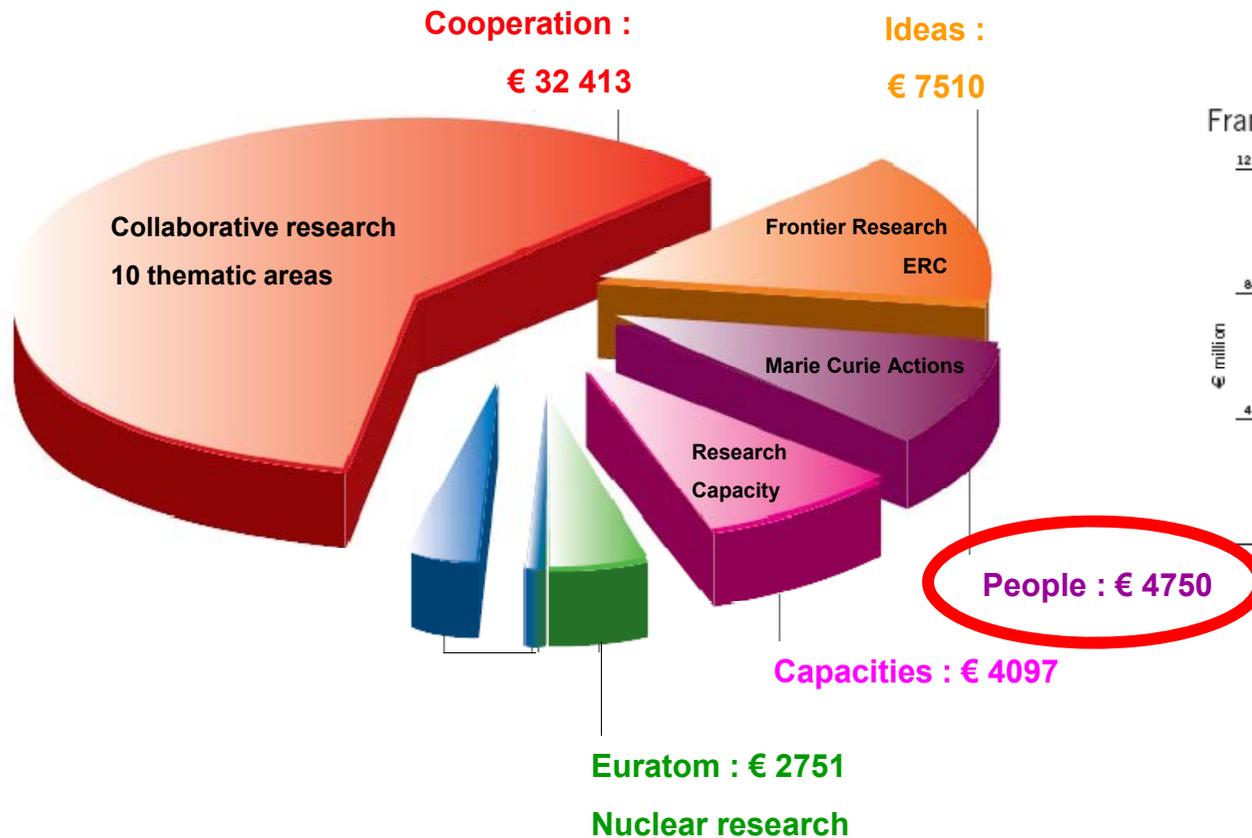
- **FP7 & PEOPLE PROGRAMME**
- Research Executive Agency (REA)
- Marie Curie Actions
- **PROJECT LIFE-CYCLE: Submission, Evaluation, Negotiation**

# 7<sup>th</sup> Framework Programme

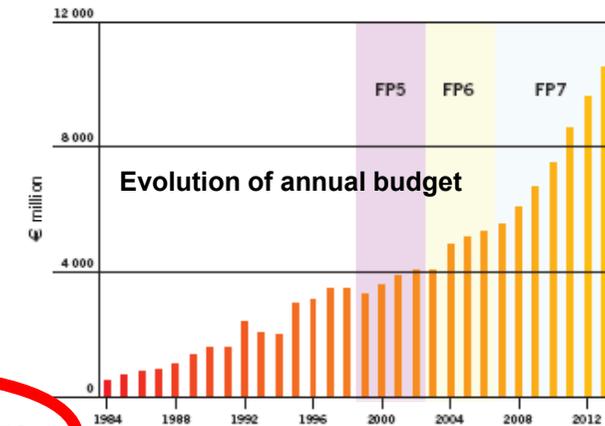


## FP7 - EU's main instrument for funding research

FP7 Aim: Contribute to the Union becoming the world's leading research area



Framework programme budget (1984-2013)



- FP7 & PEOPLE PROGRAMME
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# Executive Agencies

- Created by Commission decision (after consultation of the regulatory committee for executive agencies, and information to the parliament) in line with Council Regulation (EC) 58/2003
- Standard activities:
  - Implement programmes of the Commission
  - Operational tasks only – no policy role
  - Lifetime of the programme concerned only (renewable if the programme is renewed)

## Executive Agencies in FP7

Two agencies have been set up:

- The ERC Executive Agency (ERCEA): to support implementation of the Ideas programme
  - EC/2008/37 of 14 December 2007
- The Research Executive Agency (REA): to support parts of the other indirect actions of FP7
  - EC/2008/46 of 14 December 2007

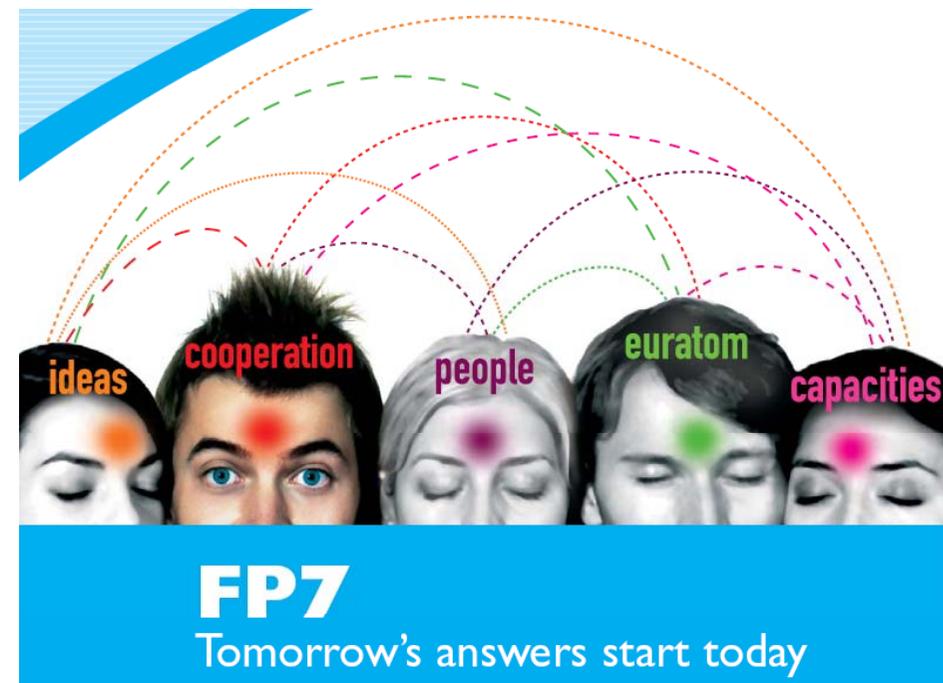
## Reasons for creating executive agencies

- Constant staff numbers in the financial perspective 2007 to 2013
- Explosion in FP budget after 2010
- New areas to manage within FP7
- Professionalise programme management
- Staffing stability

## REA – Tasks (1)

The REA directly implements these parts of FP7:

- People programme
  - Marie-Curie Actions (€4 billion)
- Cooperation programme
  - Security and Space themes (DG ENTR, €1.5 billion)
- Capacities programme
  - Research for the benefit of SMEs (€1 billion)



## REA – Tasks (2)

The REA provides “horizontal” services across the three specific programmes Cooperation, People, Capacities:

- Runs the evaluation facility (Covent Garden, Place Rogier)
- Provides a central service for contracting and paying external expert evaluators
- Provides services for the URF (unique registration facility) and legal and financial viability service
- Runs the central FP7 enquiry service

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## People programme = Marie Curie Actions

From pure mobility actions to a dedicated programme for structuring training, mobility and career development

### Objectives:

- ✓ Human resources potential in R&D in Europe
- ✓ Stimulate people to enter into the profession of researcher
- ✓ Encouraging researchers to stay in Europe
- ✓ Attracting researchers from around the world

### Two types of actions depending on the type of applicant:

- ✓ Principal Investigator
- ✓ Individual Researcher

## Main characteristics:

- ✓ Open to all domains of research (bottom-up approach)
- ✓ Application through calls for proposals
- ✓ Evaluation by international peer-reviewers
- ✓ Trans-national and inter-sector mobility
- ✓ Budget covers mainly salaries of researchers

## Eligible researchers for funding

Early-stage researchers (ESR) : research experience  $\leq$  4 years or No PhD

Experienced researchers (ER) : research experience  $\geq$  4 years or PhD holder

2 pay scales (less and more than 10 years experience)

## Mobility

Researchers not living/working in the country of the host for more than 12 months in the last 36 months before relevant deadline

## Profile of beneficiary researchers

Post-graduates  
(Early Stage Researchers ESRs)

**Directly after the studies**

Having a degree BSc, BA, MSc, MA, MBA, etc **AND** less than 4 years of research experience

Post-docs  
(Experienced Researchers ERs)

**Directly after the PhD**

**OR** having more than 4 years of research experience

Senior Post-docs  
(More Experience Researchers MERs)

Having more than **10 years of research** experience

Marie Curie Action		Objective
<b>Initial training of researchers</b> (1900 M€)	Initial Training Networks (ITN)	Improve career perspectives of early stage researchers in both public & private sector
<b>Life-long training and career development</b> (1170–1400 M€)	Intra-European Fellowships (IEF)	Career development of experienced researchers by e.g.: diversification skills/competencies; reintegrate after mobility/resume research
	Career Integration Grants (CIG)	
	Co-funding of regional, national, international programmes (COFUND)	
<b>Industry dimension</b> (250-450 M€)	Industry-Academia Partnerships and Pathways (IAPP)	Open and foster dynamic pathways between public research organisations and private commercial enterprises
<b>International dimension</b> “ <i>World fellowships</i> ” (1170–1400 M€)	International Outgoing Fellowships (IOF)	Reinforce extra-European dimension of the ERA through mobility through training, knowledge transfer and cooperation
	International Incoming Fellowships (IIF)	
	International Research Staff Exchange Scheme (IRSES)	

## Applicants

Profile of recruited researchers

Senior Post-docs  
> 10 years

Post-docs  
> 4 years

Post-graduates  
< 4 years

Individual fellowships

Industry/Research Institutions

Research funding bodies

IEF

IOF

IIF

CIG

COFUND

IAPP\*

IRSES\*\*

ITN

\* Secondment: staff all levels; Recruitment: experienced researchers

\*\*Secondment: staff all levels

## ***People – Marie Curie Actions in FP7***

### **Initial training of researchers**

Initial Training Networks

### **Life-long training and career development**

**Intra-European Fellowships / Career Integration Grants**

Co-funding of regional/national/international programmes

### **Industry-academia pathways and partnerships**

Industry-Academia Partnerships and Pathways\*

### **International dimension**

**International Outgoing & Incoming Fellowships; International Research Staff Exchange Scheme (IRSES)**

### **Specific actions**

Researcher's Night (NIGHT)

Trans-national co-operation among NCPs (NCP)

Trans-national Operation of the EURAXESS Services Network II (EURAXESS II)



# *Intra-European Fellowships IEF*

## **Main Features:**

- **Funds trans-national mobility within EU or Associated Countries (AC)**
  - **For EU/AC residents**
  - **Host institutions in EU/AC**
- **For experienced researchers (= PhD or  $\geq 4$  yrs in research)**
- **Objective: career development/competence diversification**
- **Funding for up to 2 years**
- **Full payment of the researcher**
- **Flat rate of 800€ per researcher month in Category cost 3, Contribution to the training expenses of eligible researchers and research/transfer of knowledge programme expenses**
- **Flat rate of 700€ per researcher month in Contribution to overheads**

## Intra European Fellowships

### CAREER RESTART PANEL (only IEF)

- Aims to ensure equal opportunities by encouraging researchers to return to research after a career break.
- Multidisciplinary panel (CHE, SOC, ECO, ENG, ENV, LIF, MAT, PHY)
- One additional eligibility criterion: not have been active on a fellowship, or employed under contract in research for at least 12 months immediately prior to the call deadline

## ***International Outgoing Fellowships IOF***

### **Main Features:**

- **Funds training of researchers from MS or AC in a 3rd Country**
- **For experienced researchers (= PhD or  $\geq 4$  yrs in research)**
- **Objective: career development +transfer of knowledge**
- **Fellowships of 2 phases: initial outgoing phase in a TC and a mandatory re-integration phase in a MS or AC**
- **1-2 yrs outside EU & 1 yr return to Europe**
- **Contract with return institution**

## ***International Incoming Fellowships IIF***

### **Main Features:**

- **Fellowships for experienced researchers moving from a third country to a MS or AC**
- **Objectives: Knowledge sharing and co-operation (not training!)**
- **1-2 yrs in EU/AC & option of 1 year return option if from an International Co-operation Partner Country**
- **Community contribution similar to Intra-European fellowships**
- **Return phase possible for researchers from developing countries**

Intra-European Fellowships (IEF)					
	2007	2008	2009	2010	% increase/2009
CHE	172	177	272	279	2,57%
ECO	36	45	72	71	-1,39%
ENG	122	134	204	289	41,67%
ENV	286	248	309	388	25,57%
LIF	543	577	774	885	14,34%
MAT	69	72	103	95	-7,77%
PHY	242	227	291	356	22,34%
SOC	202	258	379	495	30,61%
<b>TOTAL</b>	<b>1672</b>	<b>1738</b>	<b>2404</b>	<b>2858</b>	<b>18,89%</b>

## CAR

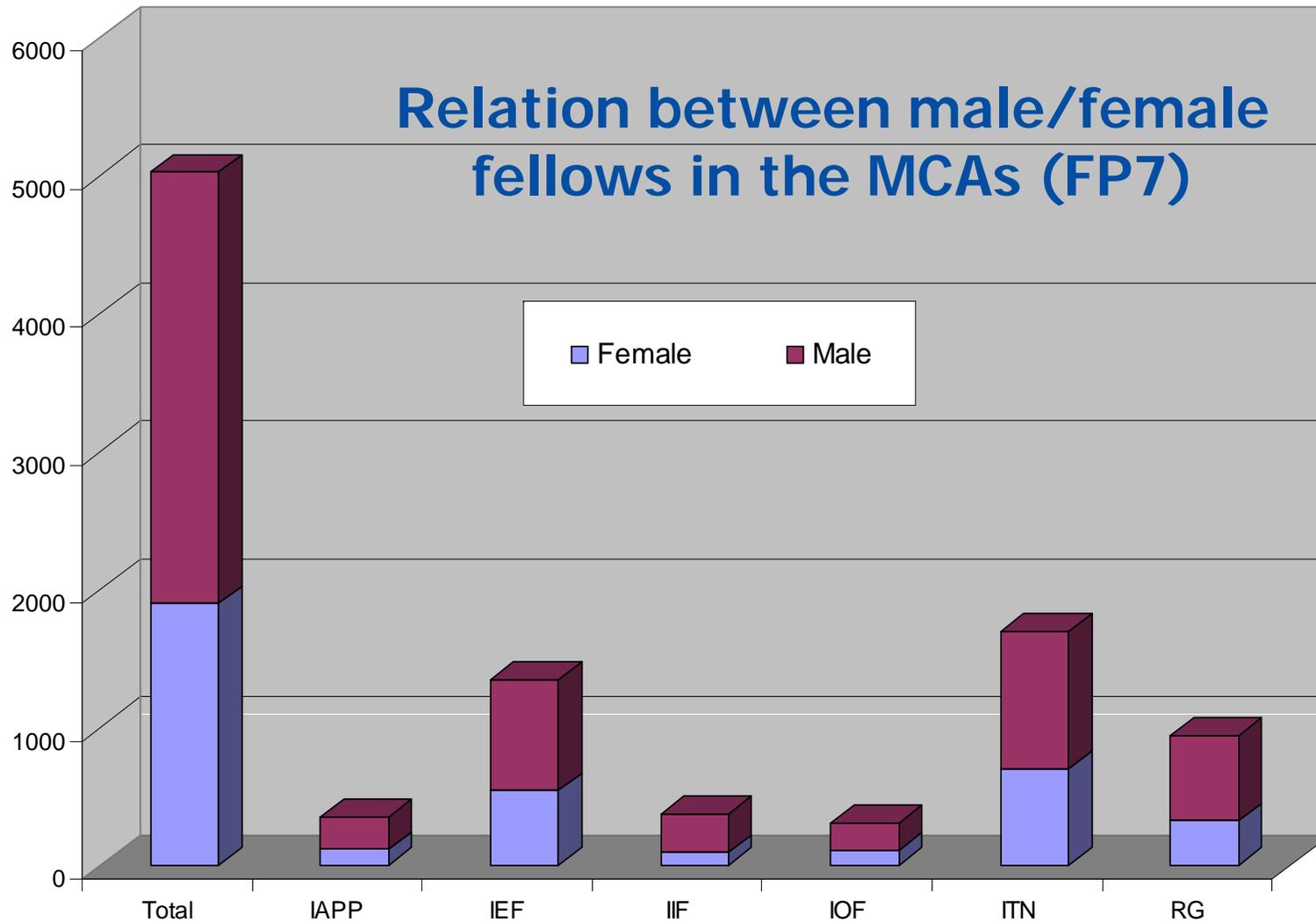
	CHE	ECO	ENG	ENV	LIF	MAT	PHY	SOC	Total
Total	7	4	13	24	27	2	14	39	130

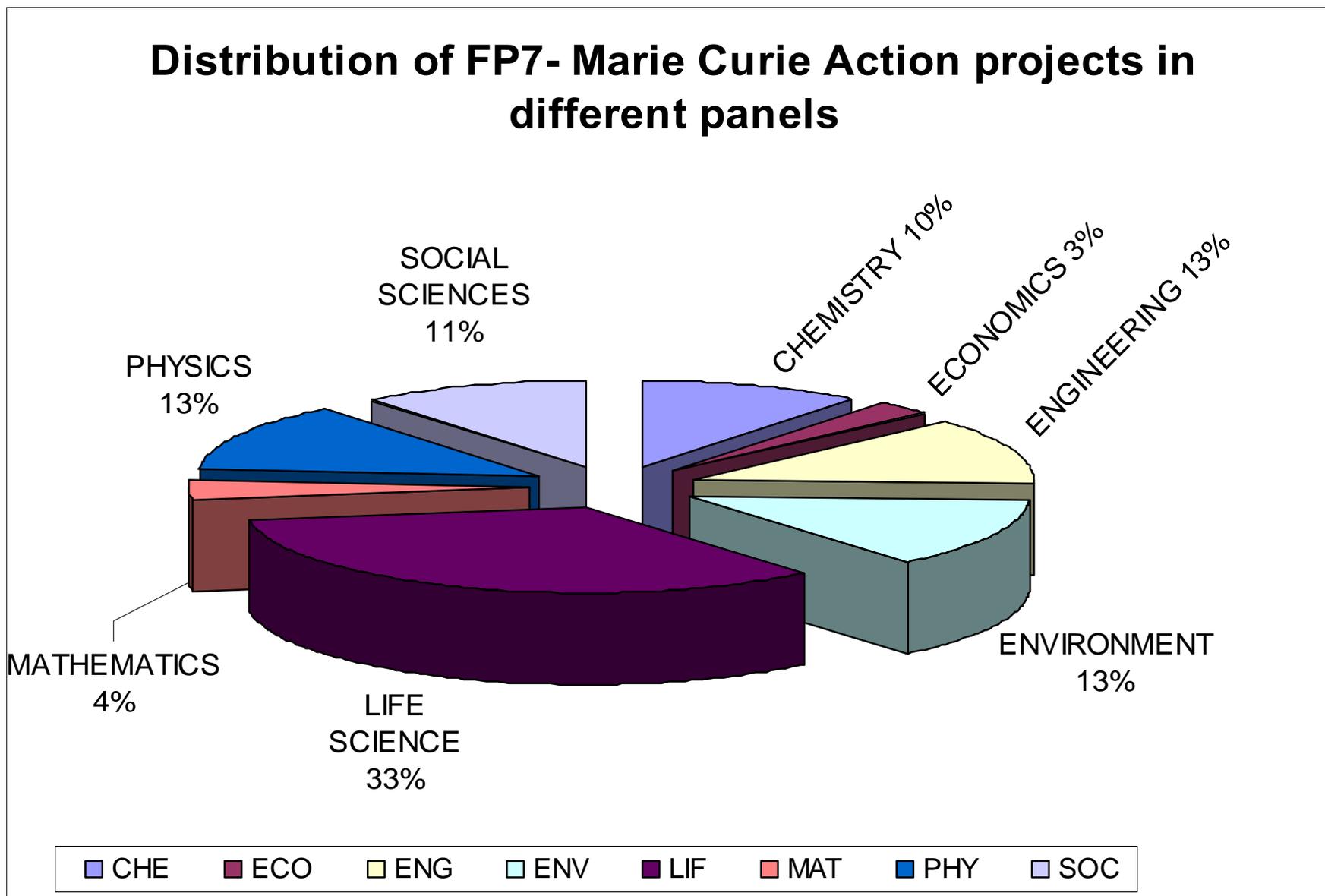
Marie Curie International Incoming Fellowships (IIF)					
	2007	2008	2009	2010	% increase/2009
CHE	98	117	161	175	8,70%
ECO	7	8	20	26	30,00%
ENG	76	101	141	168	19,15%
ENV	85	97	145	136	-6,21%
LIF	170	182	307	383	24,76%
MAT	23	21	38	30	-21,05%
PHY	77	102	170	155	-8,82%
SOC	26	33	57	96	68,42%
<b>TOTAL</b>	<b>562</b>	<b>661</b>	<b>1039</b>	<b>1169</b>	<b>12,51%</b>



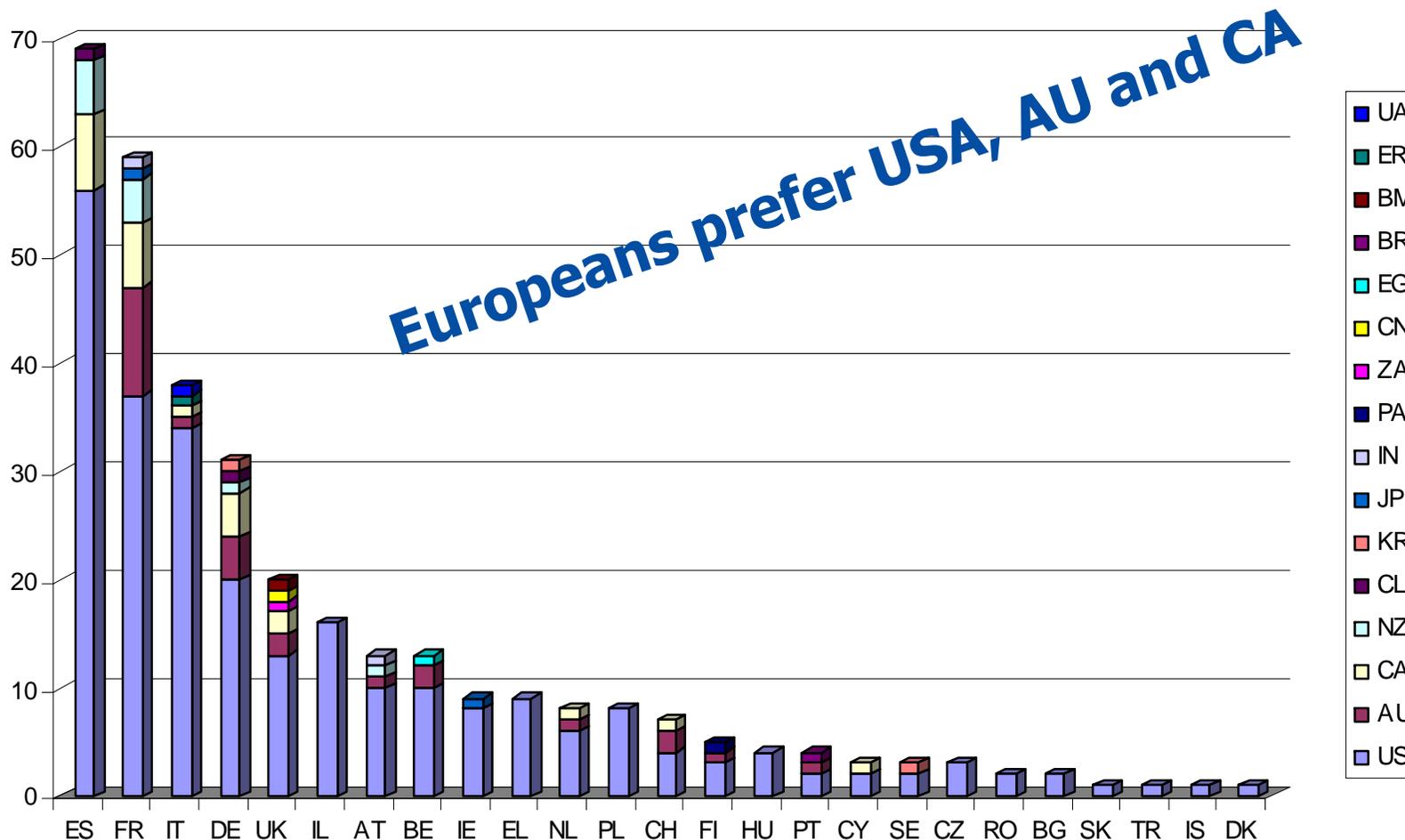
# Overall Results for IOF

International Outgoing Fellowships (IOF)					
	2007	2008	2009	2010	% increase/2009
CHE	28	32	43	55	27,91%
ECO	9	8	19	19	0,00%
ENG	40	58	67	100	49,25%
ENV	71	103	125	133	6,40%
LIF	99	126	190	218	14,74%
MAT	11	12	15	16	6,67%
PHY	41	39	56	83	48,21%
SOC	33	63	83	114	37,35%
<b>TOTAL</b>	<b>332</b>	<b>441</b>	<b>598</b>	<b>738</b>	<b>23,41%</b>





### International Outgoing Fellowships (IOF)



Marie Curie IOF 2007-2009: 330 Fellows

# Opportunities in 2011

## For IEF, IIF, IOF:

- Marie Curie Individual Fellowships
- One deadline per year. Next: 11 August 2011
- Budgets:
  - IEF: 109.85 M€
  - IIF: 40.00 M€
  - IOF: 40.00 M€
- Call indentifiers: FP7-PEOPLE-2011-IEF/IIF/IOF
- IEF/IIF/IOF call pages (guidelines, proposal submission):
  - <http://cordis.europa.eu/fp7/dc/index.cfm?fuseaction=UserSite.FP7CallsPage>



## Career Integration Grants (CIG)

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- Encourage and help researchers to establish a research career in Europe
- To increase the integration prospects of the researcher in Europe.
- To improve transfer of knowledge and lasting cooperation with previous host(s) of researcher.
- A measure to counter European brain drain.

## Career Integration Grants (CIG)

- For Experienced Researcher
  - Must have a PhD or at least 4 years of research experience
- Researcher can be of any nationality
- Researcher must move country to take up research job. (must comply with Mobility Rule)
  - During the past 36 months max 12 months spent in host country
  - No nationality requirement => Possible to return to home country
- Duration of CIG grant: 24 – 48 months.
- Host must offer full time research post for at least the duration of the CIG grant.
- EU contribution: 25 000 €/year paid as lump sum.

## Career Integration Grants (CIG)

- Builds on the previous Marie Curie Reintegration Grants, European and International (ERG, IRG).
- RG (ERG/IRG) -> Career Integration Grants (CIG)
  - For any researcher (of any nationality)
  - To assist in the establishment of a career in the ERA
  - Mobility, from any country to a EU/AC is compulsory
  - Rates the same as the old IRG (4 x €25 000)
- Summary of changes in terms of RG
  - ERG: Drop the ex-Marie Curie fellow eligibility condition
  - ERG: Reintroduce mobility eligibility condition
  - IRG: Drop the nationality condition
  - ERG/IRG: Harmonise payments at 'old IRG' rates

## Career Integration Grants (CIG) the Host perspective

- A CIG can be combined with (almost) any other funding
  - Not possible to combine with other Marie Curie grants
  - Not possible to combine with other personal grants that "pays everything" (e.g. ERC grants)
- CIG paid as lump sum => no restrictions on what type of project costs can be covered
  - Part of salary of Researcher (or other people working on project)
  - Equipment, Consumables, travels
  - Overhead, management costs
  - Etc
- Simplified reporting. (No financial reporting)

## **Career Integration Grants (CIG) the Host perspective**

- ⇒ Almost all recruitments from abroad to research positions can be combined with a CIG!
- ⇒ CIG could be made part of standard recruitment procedure. (E.g. Any successful candidate moving from a foreign country is expected to apply for a CIG...)
- ⇒ Currently high success rates for ERG/IRG grants (~50%)

- **Marie Curie Career Integration Grants**
- **Two deadlines**
  - 8 March 2011, budget 20 000 000€
  - 6 September 2011, budget 20 000 000€
- **Call identifier: FP7-PEOPLE-2011-CIG**
- **CIG call page (guidelines, proposal submission):**
  - [http://cordis.europa.eu/fp7/dc/index.cfm?fuseaction=UserSite.PeopleDetailsCallPage&call\\_id=379](http://cordis.europa.eu/fp7/dc/index.cfm?fuseaction=UserSite.PeopleDetailsCallPage&call_id=379)

## Main Features:

- Funds staff secondments of researchers, technical & management staff moving from MS or AC to 3rd countries
- Objectives: Building and foster collaboration between research centres of EU & 3rd countries via staff exchanges
- Co-operation with countries of policy relevance for EU (EU Neighbourhood policy & S&T agreement countries)
- 2 R&D orgs in MS/AC and one or more 3rd country (S&T Agreement or ENPolicy)
- Short secondments <12m, schemes last 2-4 years
- FLAT RATE : 1900€ per exchanged staff person per month and 2100€ for long distance countries

# Partnership Countries

## S&T agreement countries

- Industrialised Countries with EC International agreements on Science and Technology:
  - Australia, Canada, China\*, Japan, Rep. of Korea, New Zealand, Russia, United States
- International Cooperation Partnership Countries (ICPC) with EC International agreements on Science and Technology:
  - Argentina, Brazil, China\*, Chile, Egypt, India, Mexico, Morocco, Russia, South Africa, Tunisia, Ukraine

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

- Eastern Europe & Central Asia (EECA)
  - Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine
- Mediterranean Partnership Countries (MPC) that are not Associated countries
  - Algeria, Egypt, Jordan, Lebanon, Libya, Morocco, Palestinian-administrated areas, Syrian Arab Rep., Tunisia

\*Including Hong Kong and Macao although these territories are not eligible for ICPC funding under the IRSES scheme

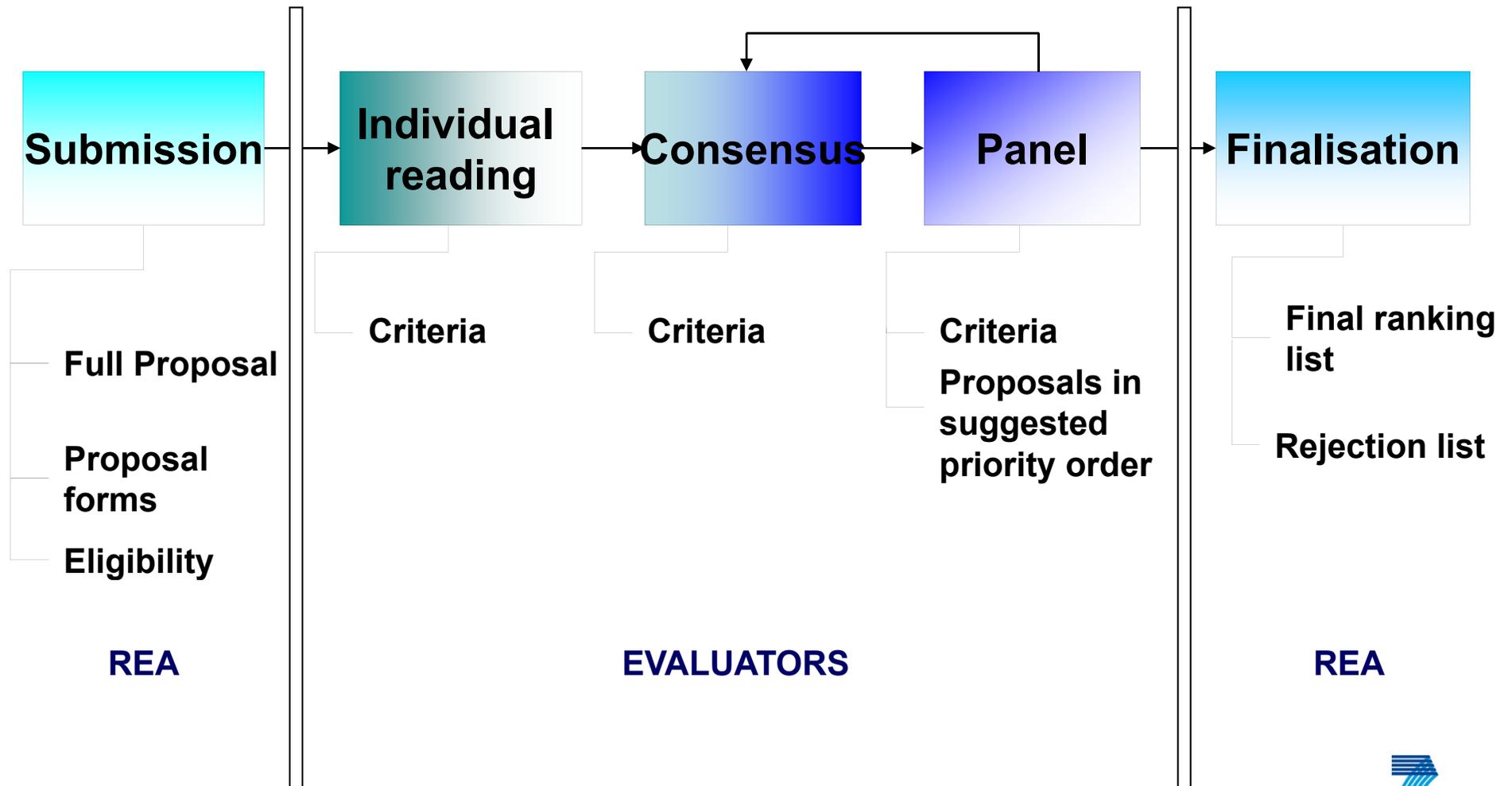
Co-funding of exchange programmes between Europe and 3rd countries

- Staff are seconded
  - Keep their salary at their home institution
  - Funds cover travel and subsistence of the researcher
- ICPC and Neighbourhood policy countries: eligible for EU funding
- Exchanges not eligible for EU funding (own resources)
  - MS/AC <-> MS/AC
  - non-ICPC > MS/AC
  - ICPC <-> ICPC

- **Marie Curie International Research Staff Exchange Scheme**
- **One deadlines**
  - 17 March 2011, budget 30 000 000€
- **Call indentifier: FP7-PEOPLE-2011-IRSES**
- **IRSES call page (guidelines, proposal submission):**
  - [http://cordis.europa.eu/fp7/dc/index.cfm?fuseaction=usersite.FP7DetailsCallPage&call\\_id=382](http://cordis.europa.eu/fp7/dc/index.cfm?fuseaction=usersite.FP7DetailsCallPage&call_id=382)

- FP7 & PEOPLE PROGRAMME
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- **PROJECT LIFE-CYCLE:**  
**Submission, Evaluation, Negotiation**

- Consultations in Brussels
- Read carefully the **latest version of 2011** People Work Programme and the Guide for Applicants
- Check if you comply with the **eligibility rules**
- **Very good** Exchange Research Project
- Be **precise** and demonstrate your **skills**
- Follow the given **structure**
- Underline important clear information



# Scoring

- Examine each evaluation criterion;
- Score on a **scale from 0 to 5**; decimals may be used;
- Scores must pass individual and total thresholds if a proposal is to be considered for funding (total threshold: 70%);
- Score values indicate the following assessments:

**0** The proposal fails to address the criterion under examination or cannot be judged due to missing or incomplete information;

**1 Poor** *The criterion is addressed in an inadequate manner, or there are serious inherent weaknesses;*

**2 Fair** *While the proposal broadly addresses the criterion, there are significant weaknesses;*

**3 Good** *The proposal addresses the criterion well, although improvements would be necessary;*

**4 Very Good** *The proposal addresses the criterion very well, although certain improvements are still possible;*

**5 Excellent** *The proposal successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor;*

### **The REA sends electronically a letter (« initial information letter » together with the Evaluation Summary Report –ESR)**

- The ESR aims to give the applicants a prompt indication of how their proposals fared in the evaluation by the experts
- The ESR reflects the consensus reached by the experts and the final review by the panel
- It contains comments and scores on each criterion and an overall score as well as providing overall comments when appropriate

**Timing :** Evaluation results available within 4-6 months after the deadline for submission

### NEGOTIATION

- Legal status and validation of host organisation ("PIC")
- Valid bank account linked to host organisation
- Contact persons for various tasks
  - LEAR (Legal Entity Appointed Representative)
  - Legal Representative
  - Administrative Contact Person
  - Scientist in Charge
  - The Researcher
  - Contact Person Bank Account
- Start date!
  - At the earliest 8 months after the call deadline
  - Three different start date options

## During the negotiation:

- agree on budget
- agree on technical Annex I
- agree on start date and duration
  
- participant administrative data
  
- participant (legal entity) validation
  
- financial viability check (if applicable)
  
- If everything OK, the Commission formally approves the negotiation
  
- Grant Agreement signature
- The project can start

- Information Marie Curie - PEOPLE Programme
- [http://cordis.europa.eu/fp7/people/home\\_en.html](http://cordis.europa.eu/fp7/people/home_en.html)
  
- Marie Curie Actions:
- <http://ec.europa.eu/research/mariecurieactions/>
  
- Find a Call:
- <http://cordis.europa.eu/fp7/dc/index.cfm?fuseaction=UserSite.FP7CallsPage>
  
- The Mobility Portal (EURAXESS)
- [http://ec.europa.eu/euraxess/index\\_en.cfm](http://ec.europa.eu/euraxess/index_en.cfm)
  
- Registration of experts:
- <http://cordis.europa.eu/emmfp7/>

***Thank you for your attention!***