



GUIDE FOR APPLICANTS

Marie Curie Actions *People*

Marie Curie International Outgoing Fellowships for Career
Development (IOF)
Call identifier FP7-PEOPLE-IOF-2008
Closing Date 19 August 2008 at 17h00 (Brussels local time)



Foreword

Definitions used throughout this Guideline:

Host organisation is the legal entity located in an EU Member State (MS) or Associated Country (AC) with which the Commission will sign the *grant agreement* and where the return phase of the project is going to take place (*return host organisation*). The outgoing phase will take place in a *Third Country* at the *outgoing host organisation*.

Experienced researchers must, at the time of the relevant deadline for submission **either** be in possession of a doctoral degree, irrespective of the time taken to acquire it, **or** have at least four years of full-time equivalent research experience after obtaining the university diploma that formally gives them access to doctoral studies.

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

Scientist in charge is the scientist team leader located at the *host organisation* who will supervise the fellow researcher during the whole duration of the project. He will be the person the Commission will contact concerning this proposal (e.g. for additional information, invitation to hearings, sending of evaluation results, convocation to negotiations).

Coordinator is the participant who is taking the lead in the preparation of the proposal as the "proposal coordinator". For a given proposal, the coordinator acts as the single point of contact between the participants and the Commission. Important, before the call deadline, the fellow researcher would be considered as the "proposal coordinator". However after the call deadline the *scientist in charge* will be the only single contact point. As a reminder the fellow researcher and the scientist cannot be the same person.

Location of origin / Country of origin means the place where the researcher was residing or carrying out his/her main activity at the time of the relevant deadline for proposal submission unless s/he has resided or carried out her/his main activity for less than 12 months in this location immediately prior to this date. In the latter case, the location of origin is the capital city of the country of her/his nationality.

Laboratory based refers to costs associated with the proposal beyond those of a purely theoretical study which is executed with office based equipment such as field trips, expensive computer run-time, supply of chemicals or costs associated with working in a laboratory.

National Contact point (NCP) is a network of offices where information on EC programs is available and may assist the fellow researcher in his/her application.

About this Guide

This Guide explains the principles of Marie Curie International Outgoing Fellowships for Career Development (IOF) to be funded under the EU's Seventh Framework Programme.

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

Marie Curie Initial Training Networks (ITN)
Marie Curie Marie Curie European Reintegration Grants (ERG)
Intra-European Fellowships for Career Development (IEF)
Marie Curie Co-funding of Regional, National, and International Programmes (COFUND)
Marie Curie Industry-Academia Partnerships and Pathways (IAPP)
Marie Curie International Incoming Fellowships (IIF)
Marie Curie International Reintegration Grants (IRG)
Marie Curie International Research Staff Exchange Scheme (IRSES)

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

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

Please note:

This Guide is based on the rules and conditions contained in the legal documents relating to FP7 (in particular the Seventh Framework Programme, Specific Programmes, Rules for Participation, and the Work programmes), all of which can be consulted via the CORDIS¹ website (<http://cordis.europa.eu>).

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

¹ Community R&D Information System

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THE ESSENTIALS

What are Marie Curie International Outgoing Fellowships for Career Development?

This action aims to reinforce the international dimension of the career of European researchers by giving them the opportunity to be trained and acquire new knowledge in a *Third Country* high-level research organisation. Subsequently, these researchers will return with the acquired knowledge and experience to an organisation in a Member State or Associated country.

Who can apply?

Researchers from a Member State (MS) or Associated Country (AC), who at the date of the deadline are in possession of a doctoral degree or have at least 4 years full-time equivalent research experience after obtaining the degree which allows them to embark on a doctorate. (Full eligibility criteria are provided in section 2 and Annex 2 of this Guide).

Which research topics are supported?

All Marie Curie actions have a **bottom-up approach**, i.e. research fields are chosen freely by the applicants. All domains of research and technological development addressed under the EC Treaty are eligible for funding.

How does it work?

Proposals are submitted jointly by the (European) *host organisation* and the individual researcher within the specified deadlines. Eligible proposals are evaluated by external independent experts against a series of predetermined criteria. Financial support will be provided to the selected proposals for a period of up to 36 months, including an initial outgoing phase (12-24 months, full-time equivalents) in a *Third Country* and a **mandatory** reintegration phase (12 months).

What does the funding cover?

Funding is provided for advanced training on the basis of the "personal career development plan". The financial support for International Outgoing Fellowships takes the form of a grant covering up to 100% of the budget. It includes in particular a salary for the researcher and a contribution towards research-related costs.

How much funding is involved per fellowship?

This Community contribution depends on several parameters including the researcher's level of experience and family situation, the countries where the training research activities will be carried out, and whether it is a laboratory-based project or not.

How to apply?

This Guide contains the essential information for you to prepare and submit a proposal for a Marie Curie **International Outgoing Fellowship** for Career Development (IOF). You should also consult the relevant legal documents (listed in the Annex 1 of this document) in order to better understand the evaluation process, rules of participation, contractual and financial issues, etc. Proposals are submitted electronically via the Commission's Electronic Proposal Submission Service (EPSS). Detailed instructions are available in this Guide.

1. Getting started

Funding decisions in the Seventh Framework Programme (FP7) are made on the basis of **calls** published by the Commission, which solicit **proposals**. Proposals describe planned research, training or transfer of knowledge activities and provide information on who will carry them out. They must be submitted using a special web-based service before a strictly-enforced **deadline**. The Commission evaluates all eligible proposals in order to identify those whose quality is sufficiently high for possible funding. The basis for this **evaluation** is a peer-review carried out by independent experts.

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

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

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

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

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

2. About the Marie Curie Action: "International Outgoing Fellowships for Career Development" (IOF)

2.1. General aspects

2.1.1 Purpose

The specific objectives of the Marie Curie International Outgoing Fellowships for Career Development can be described as follows²:

"This action aims to reinforce the international dimension of the career of European researchers by giving them the opportunity to be trained and acquire new knowledge in a Third Country, high-level research organisation. Subsequently, these researchers will return with the acquired knowledge and experience to an organisation in a Member State or Associated country ("People" Work programme, section 4.1.1".

Researchers applying to this action need to identify and develop a research training project that will provide the means to reach professional maturity and independence and to add different/complementary scientific competencies to their careers (such as inter/multi-disciplinary research, research management skills and inter-sectoral mobility) by exposing them to a research training experience outside Europe. A fundamental concept underlying this action is that of advanced training and life-long learning of European researchers, while by means of the return-phase their experience and knowledge acquired as well as the contact-network built up outside Europe is used to the benefit of the development of the European knowledge-based economy and society.

2.1.2 Structure

Proposals for IOF involve formally a *return host organisation* established in a Member State or Associated Country, and a partner organisation from a *Third Country*. The project proposals are presented by researchers who meet the eligibility criteria (see chapter 2.3) in liaison with the *return host organisation* that signs the *grant agreement*.

2.1.3 Duration

International Outgoing Fellowships have a minimum duration of 24 months up to a maximum of 36 months, with an outgoing phase of 12 to 24 months and a **mandatory** reintegration phase of 12 months (Work Programme section 4.1.2).

2.1.4 How does it work?

To show how International Outgoing Fellowships work, the following page shows its life cycle.

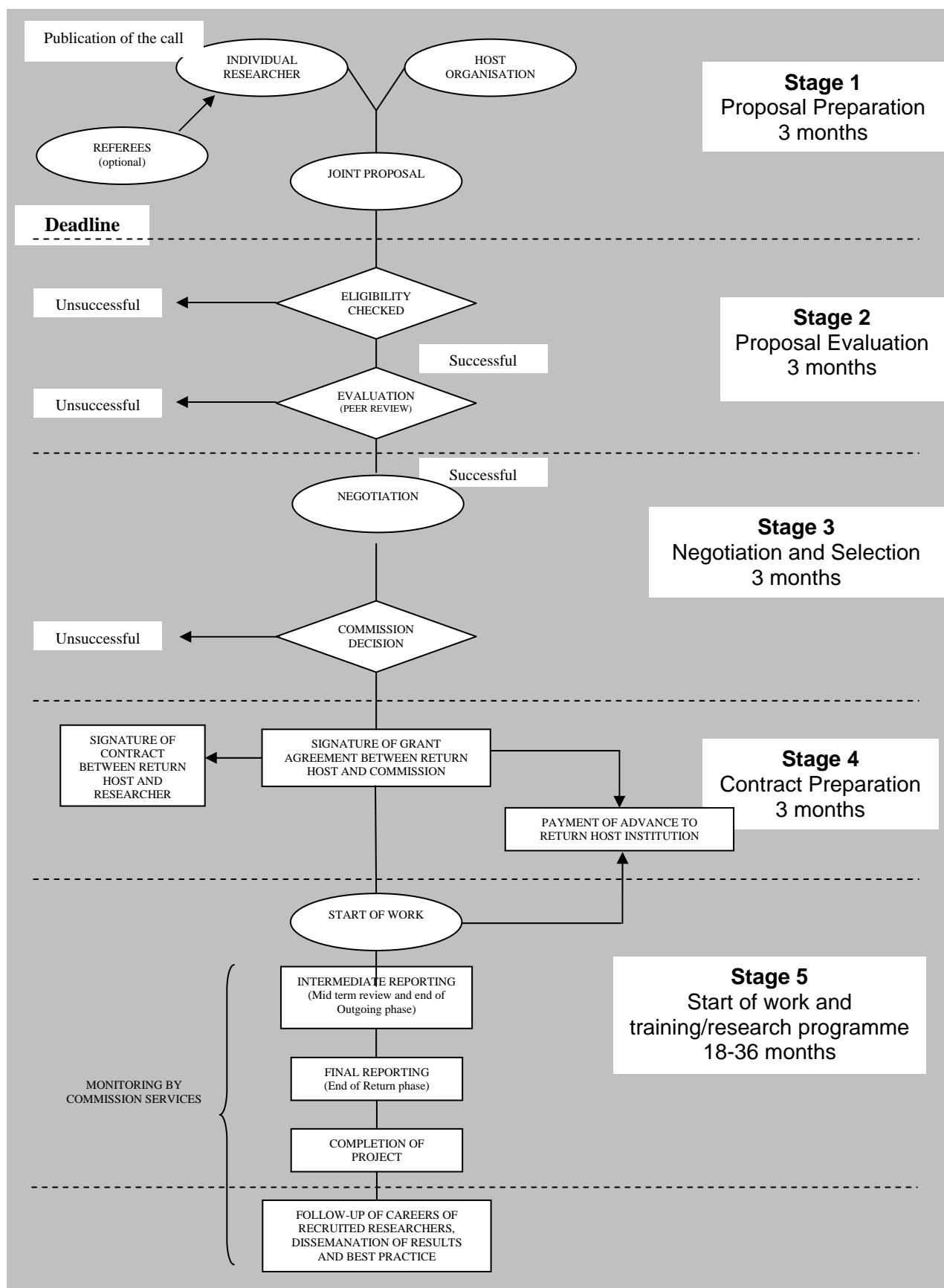
2.1.5 The topic of the Project

All Marie Curie actions have a **bottom-up approach**, i.e. all fields of research of interest to the European Union are eligible for funding (except areas of research covered by the EURATOM Treaty).

² From the "People" Work Programme, section I Context

All research carried out must respect fundamental ethical principles, and the requirements set out in the text of the People Specific Programme. (See also Section 3.1 of this Guide).

LIFE CYCLE OF AN INTERNATIONAL OUTGOING FELLOWSHIP



The Concept of Panels

For practical organisational reasons, proposals will be classified under eight major areas of science (known as 'panels'): Chemistry (CHE); Social and Human Sciences (SOC); Economic Sciences (ECO), Information science and Engineering (ENG); Environmental and Geo-Sciences (ENV); Life Sciences (LIF); Mathematics (MAT), and Physics (PHY). The applicant chooses the panel to which the proposal will be associated at the proposal stage (using the field 'Scientific Panel' on the A1 proposal submission form) and this should be considered as the core discipline. Additional keywords are used to define the other disciplines that may be involved. The choice of panel and keywords will guide the Commission in the selection of experts for proposal evaluation. The Commission reserves the right to move proposals from one panel to another. Note that there is no predefined budget allocation among the panels in the call for proposals. As a general rule the budget will be distributed over the panels based on the proportion of eligible proposals received in each panel.

To help you select the most relevant panel for your proposal a breakdown of each scientific area into a number of sub-disciplines is provided in Annex 3 of this document.

2.2. Eligible organisations

What type of organisations can take part?

Many different types of *host organisation* can take part in IOF:

- National Governmental or public organisations (e.g. universities, research centres etc);
- Commercial enterprises, especially those of small and medium size (SMEs);
- Non-profit or charitable organisations (e.g. NGOs, trusts, etc.)
- International European Interest Organisations (e.g. CERN, EMBL, etc);
- The Joint Research Centre of the European Commission;

In principle, only legal entities located in Member States of Associated countries may participate for the return phase. For the outgoing phase legal entities are located in Third Countries.

'legal entity' means any natural person, or any legal person created under the national law of its place of establishment, or under Community law or international law, which has legal personality and which may, acting in its own name, exercise rights and be subject to obligations.

Where can the return host organisations be located?

There are certain minimum conditions that have to be met relating to participation from the EU and Associated countries. These conditions vary between funding schemes in FP7, and may even vary from call to call. See the call fiche for the conditions applicable to this call. Here is the list for this call:

The EU Member States are:

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

The Associated Countries are:

Albania, Croatia, FYR Macedonia, Iceland, Israel, Liechtenstein, Montenegro, Norway, Serbia, Switzerland and Turkey

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

The participation and funding of the above types of organisation based in Member and Associated countries is foreseen for IOF according to the Rules for Participation in FP7 (this document contains the binding definitions of the above categories of organisation, see http://cordis.europa.eu/fp7/participate_en.html).

Where can the outgoing organisations be located?

The partner organisations taking part in the projects by hosting researchers during the outgoing phase should be legal entities distinct from the *return host organisation* and could be located in any Third Countries.

2.3. Eligible researchers

To be able to participate in a Marie Curie Action, a number of eligibility criteria must be fulfilled at the time of the deadline for proposal submission. After the deadline, submitted proposals will be checked for eligibility. Those proposals that do not meet the criteria will not undergo scientific evaluation and will be rejected.

These eligibility criteria will be checked based on the information given by the applicant in the proposal particularly based on the information in the A form. If at a later stage, an eligibility criterion is found not to be fulfilled (for example, due to incorrect or misleading information contained in the proposal or because the applicant has not been awarded his or her PhD or has insufficient post-graduate research experience), the proposal will be immediately rejected.

2.3.1 Level of Experience

International Outgoing Fellowships are directed exclusively at experienced researchers, defined as persons who either:

- i) have at least 4 years of research experience (full-time equivalent) after obtaining the university diploma that formally gives them access to doctoral studies (without having to acquire any further qualifications) in the country in which the degree was obtained, or*
- ii) are already in possession of a doctoral degree.*

The time limit to fulfil the above conditions is the date of the relevant call deadline. Once a researcher has obtained a diploma entitling her/him to commence doctoral studies the “clock” starts ticking. In the event that a researcher has taken a break from their research career for whatever reason (e.g. working outside research, family reasons, etc.), then the clock is stopped and only starts once they resume their research career.

Hence, there are two possible scenarios that can be illustrated by the following examples:

Scenario 1: At least 4 years research experience and no PhD:

Example of eligible applicant: graduated 4 years prior having obtained the degree allowing the researcher to commence doctoral studies. The researcher does not have a PhD but has worked full-time in research for the last 4 years prior to the deadline for proposal submission.

Example of an ineligible applicant: graduated 7 years prior having obtained the degree allowing the researcher to commence doctoral studies. The researcher does not have a PhD and has been working in research since graduation but only to a full-time equivalent of 3 years up until the deadline for proposal submission.

Scenario 2: Less than 4 years research experience but holding a PhD:

Examples of eligible applicants:

A) Awarded a PhD 2 years prior to the call deadline. The researcher has not been working in research ever since and has a total full time research experience of only 3 years.

B) Graduated 3 years prior to the call deadline having obtained the degree allowing her/him to commence doctoral studies. The researcher obtains a PhD at the latest on the date of the deadline for proposal submission.

Example of an ineligible applicant: graduated 3 years prior to the call deadline, having obtained the degree allowing the researcher to commence doctoral studies. The researcher expects to obtain a PhD 2 months after the deadline for submission of applications.

If you are at an early stage of your career and do not have the level of experience that allows you to comply with any of the above criteria, you may still be eligible to participate in other Marie Curie actions directed at early-stage researchers.

2.3.2 Mobility and Nationality Conditions

Additionally, in order to participate in this action the researcher must comply with a series of conditions regarding trans-national mobility and nationality.

Researchers must be nationals of a Member State or Associated Country (please see a list in section 2.2) and must not have resided or carried out their main activity (work, studies, etc.) in the outgoing country for more than 12 months in the 3 years prior to the relevant deadline for proposal submission. Short stays such as holidays are not taken into account.

The mobility is toward a *Third Country* (outgoing phase) and the return phase can be in any MS/AC, including the researcher's country of nationality native.

Researchers from Third Countries³ are not eligible, even if they have spent three out of the last four years in a Member State or Associated Country (the concept of "assimilated nationality" introduced in some of the Marie Curie actions is not valid here).

Examples:

Applicants complying with the mobility rules:

A) A Danish national who has always resided in Denmark may apply for a fellowship in Australia (outgoing phase) along with a mandatory return phase in any Member State country or Associate country.

B) A Hungarian national who resides and works in Germany may apply for a fellowship in the United States (outgoing phase) along with a mandatory return phase in any Member State country or Associate country.

Applicant not complying with the mobility rules:

A) A South African national who has resided and worked in research in the UK during the last 6 years can not apply for an International Outgoing Fellowship.

B) An experienced researcher with British nationality who has been residing 16 months in South Africa during the last 3 years can not apply for an International Outgoing Fellowship with an outgoing phase in South Africa.

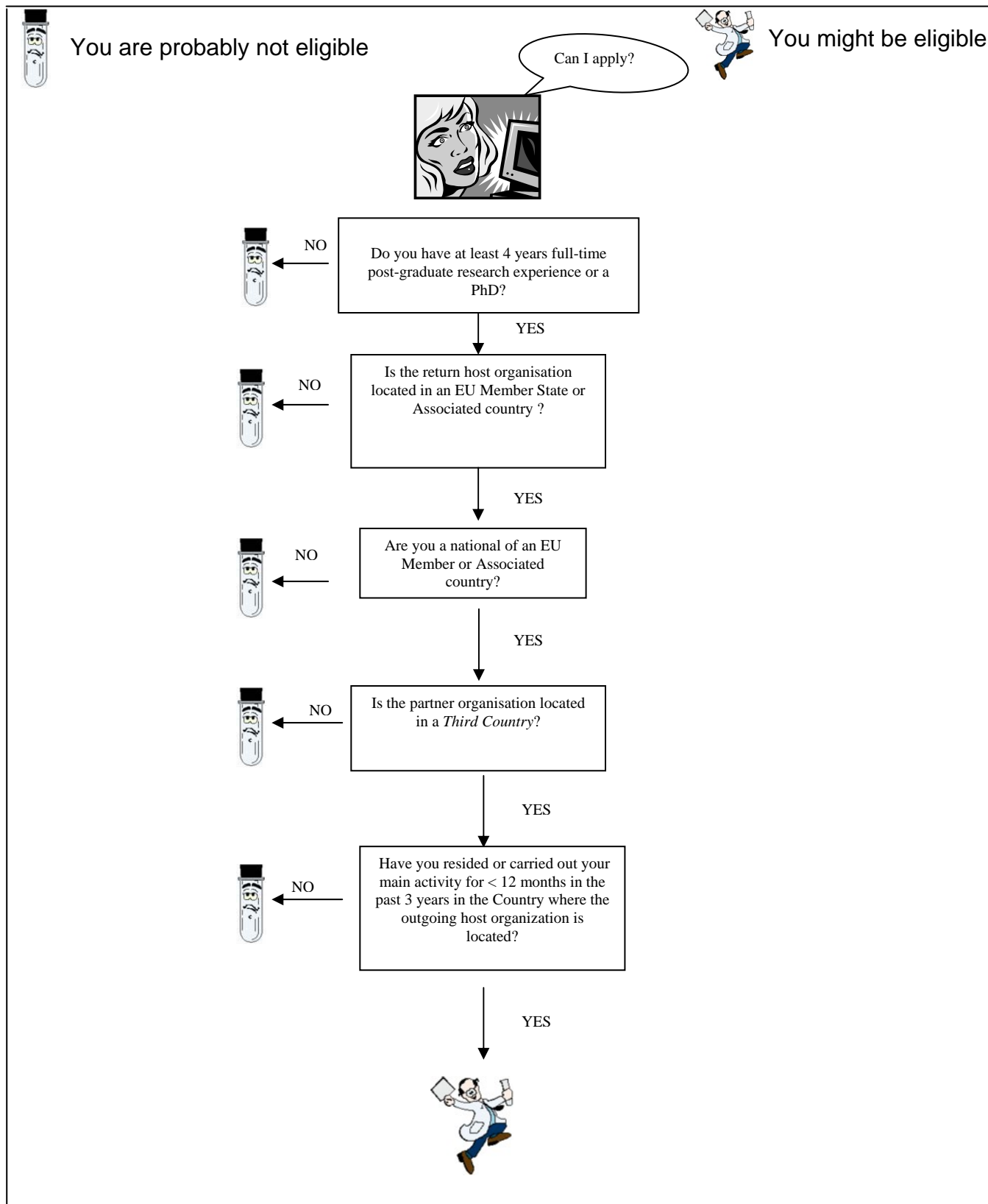
2.3.3 Finding your way through the eligibility criteria

To make it easier for you as an individual researcher or *host organisation* to determine the eligibility of an experienced researcher to be appointed within an IOF, the flowchart on the following page has been prepared. Please note that this chart is indicative only and you are always advised to check the text of the Work programme.

³ i.e. not an EU Member State or an Associated Country.

INDICATIVE CONDITIONS FOR ELIGIBILITY FOR AN IOF

In the following diagram, the conditions under which a researcher may be eligible for a Marie Curie Outgoing International Fellowship are described.



2.4. Typical Activities of an International Outgoing Fellowship for Career Development

2.4.1 Training activities

The main activities of an IOF will be based on a research project prepared by the fellow researcher in coordination with the *return host organisation*. This project is tailored in order for the researcher to reach a realistic and well-defined objective in terms of career advancement like strengthening or attaining a leading independent position, or resuming a research career after a break. The project will be shaped in order to significantly develop and widen the competences of the researcher, in particular in terms of multi- or interdisciplinary expertise, inter-sectoral experience and complementary skills.

Such training activities might include:

- Primarily, training-through-research under supervision by means of an individual personalised project;
- Hands-on training activities for developing scientific (new techniques or instruments, etc.) and complementary skills (proposal preparation to request funding, patent applications, project management, tasks coordination, technical staff supervision, etc.)
- Inter-sectoral or interdisciplinary transfer of knowledge,
- Capacity to build collaborations,
- Taking active part in the scientific and financial management of the research project,
- Developing organisational skills through organisation of training or dissemination events,

A **Personal Career Development Plan** will be established by the researcher and her/his supervisor at the *return host organisation* in order to aid in the provision of the research training programme and scientific objectives that best suits the needs of the researchers. This plan will act as a reference for the researcher himself to monitor his progress and take corrective action when necessary in order to attain the target set in terms of professional development.

2.5. Financial Regime

The conditions for funding the activities undertaken by the researcher in order to attain the project deliverables are defined in Annex 3 of the Work Programme. The contribution relates to the costs of the Fellowship and directly related costs only. The host institution must cover all other costs connected to hosting the fellow and the implementation of the project (see *Art. III.2 f* of the "Specific Provisions" of the *Grant Agreement*).

2.5.1 What types of expenses are covered?

According to the Work Programme, the eligible expenses may be broadly divided into:

- *Eligible expenses for the activities carried out by the researcher;*
- *Eligible expenses for the activities carried out by the host organisations and for the benefit of the researcher.*

The financial support for International Outgoing Fellowships takes the form of a grant covering up to 100% of the budget, comprising the following components:

2.5.2 Expenses for the activities carried out by the researchers

- a monthly living allowance:

This refers to the basic monthly amount to be paid each month to the researcher according to table I in Annex 3 of the Work Programme. This is then adjusted, applying a correction

factor for the cost of living according to the country in which s/he will be appointed, as shown in Table 3 in Annex 3 of the Work Programme

As a general rule researchers shall be appointed under an employment contract except in adequately documented cases or where national regulation would prohibit this possibility. When an employment contract cannot be provided, the researcher shall be recruited under a status equivalent to a fixed amount fellowship, provided that it is compatible with the national legislation and that adequate social security is provided (but not necessarily paid from the fellowship).

As a general principle the choice of appointment type should be made in accordance with the best interests of the researchers. The European Charter for Researchers and the Code of Conduct for the recruitment of researchers offer a reference framework for the employment of researchers.

In all cases, the hosts must ensure that the researcher is covered under the social security scheme which is applied to employed workers within the country of the contractor, or under a social security scheme providing an adequate protection and covering the researcher in every place of implementation of the IOF activities.

The living allowance is a gross Community contribution to the salary costs of the fellow. Consequently, the net salary results from deducting all compulsory social security contributions as well as direct taxes (e.g. income tax) from the gross amounts.

NOTE that social security contributions and taxation vary from country to country. In order to obtain an estimation of the actual net allowances for the researchers, it is recommended to consult the host institution and/or the relevant National Contact Point (Annex1).

The host organisation may pay a **top-up** to the eligible researchers in order to complement this contribution.

- a mobility allowance:

This is a monthly payment of a fixed amount to cover expenses related to the mobility (relocation, family expenses, language courses, etc.). As for the living allowance, a correction factor for the cost of living of the country of execution of the project is applied (see table 3 in Annex 3 of the Work Programme). There are two reference amounts depending on the family situation of the researcher at the time of the relevant deadline for submission of proposals:

- € 800/month: Researcher with family obligations (marriage or equivalent status recognised by national legislation of the country of the host or of the nationality of the researcher, and/or charge of children).
- € 500/month: Researcher without family obligations.

Mobility allowance is only paid in those cases where there is trans-national mobility of the researcher. Consequently, a fellow who is returning to his country of origin (see definition below) after the outgoing phase would not receive a mobility allowance during the return phase.

- a travel allowance:

This refers to an allowance given upon taking up employment and yearly thereafter. As shown in table 2 in Annex II of the Work Programme, it is based upon the direct distance between the *location of origin* and the host institution of the researcher.

NOTE: the location of origin means the place where the researcher was residing or carrying out his/her main activity at the time of the relevant deadline for proposal submission unless s/he has resided or carried out her/his main activity for less than 12 months in this location immediately prior to this date. In the latter case, the location of origin is the capital city of the country of her/his nationality (in case of a researcher holding more than one nationality, the location of origin is the capital city of the country where the researcher was residing for the longest period during the last 5 years prior to the relevant deadline for submission of the proposal).

The country of origin is the country in which the location of origin is situated.

Fellows with a 18-24-month outgoing fellowship are entitled to 2 travel allowances, whereas those on longer fellowships (25-36 months) will receive 3 travel allowances.

Travel allowance is only paid in those cases where there is trans-national mobility of the researcher or when the location of origin of the fellow and the location of the host institute although in the same country are not in the same town (i.e. fellow who is leaving from Milan (location of origin) to New York but returning to Rome (location of host) is entitled of a travel allowance between Milan and Rome.

- a contribution to the participation expenses of eligible researchers:

This contribution is managed by the hosting organisations (partner organisation for the outgoing phase and return host for the reintegration phase). In principle **all** costs related to the successful execution of the project by the fellow (e.g. *purchase of consumables, participation in conferences and training courses, fees for scientific journals, memberships in scientific associations etc.*), and which would normally not arise if the fellow was not hosted at the institution, are eligible. This contribution consists of a fixed amount:

- €800 per researcher-month: for laboratory based⁴ research projects
- €500 per researcher-month: for non-laboratory based research projects

2.5.3 Expenses for the activities of the host organisation for the benefit of the researcher

- management costs (including certification on financial statements):

This refers to a maximum of 3% of the Community contribution that will be paid towards the management of the project. This will also cover the cost for certificates on financial statements.

- contribution to overheads:

This refers to a flat rate payment of 10% of the direct costs (excluding costs for subcontracting if any).

The maximum amount of the grant will be fixed in the *grant agreement* after the negotiation phase.

2.5.4 How do I estimate the EC contribution?

The contribution relates to the costs of the Fellowship and directly related costs only. Applicants are not required to calculate the amount of the estimated EC contribution. This will be automatically calculated from the information contained in the A4 form of the proposal, using the rates, allowances and coefficients given in Annex 3 of the Work Programme. If the proposal is selected

⁴ A project is laboratory based if there are costs associated with the proposal beyond those of a purely theoretical study which is executed with office based equipment

by the Commission for funding, the EC contribution will be calculated more accurately during the negotiations taking into account any recommendations made by the independent evaluators.

The example below aims to help understanding the way the contributions are calculated.

Example:

A researcher with 6 years experience and family charges, going from Lisbon (where s/he has always resided and worked) to Harvard, Boston (USA) for a 2-year outgoing phase and a 1 year re-integration phase in Lisbon with an Outgoing International Fellowship under an employment contract and with location of origin in Portugal. The project is lab based.

EXPENSES FOR THE ACTIVITIES CARRIED OUT BY THE RESEARCHER (all are part of the direct costs mentioned in Annex 3 of the Work Programme:

Outgoing Phase

- Living allowance: € 53,000 x 2 years = € 106, 000
- Mobility allowance: € 800 x 24 months = € 19, 200

Correction factor for USA = 100,5 %

(Total Living allowance + Total Mobility allowance) x Correction factor for USA = € 125,200 x 100.5% = € 125,826

- Travel costs: 2,000 € x 2 years = € 4,000 (based on the fact that Lisbon is 5,131 km away from Boston), which translates into an annual travel allowance of 2,000 €

Return Phase

- Living allowance: € 53,000 x 1 year = € 53, 000
- Mobility allowance: None (return to country of Origin)

Please note that if the researcher would return to a different Member State or Associated Country than his country of origin, he would be entitled to a mobility allowance for the return phase.

Correction factor for Portugal = 91,4%

*(Total Living allowance + Total Mobility allowance) * Correction factor for Portugal = € 53,000 x 91.4% = € 48,442*

- Travel costs: None

Please note that if the researcher would return to a different town than his town of origin, he would be entitled to a travel allowance for the return phase.

Note that these amounts represent the Community contributions to salary costs and as such include compulsory social security contributions and income tax, if relevant. The mobility and travel allowances must also be taken into account when calculating the total expenses.

Community Contribution for the researcher (gross): € 174,268

Contribution to the participation expenses of eligible researchers (managed by the host institutions)

Research costs (lab based): € 800 x 36 = € 28, 800

**Community Contribution for the activities carried out by the researcher:
€ 203,068**

EXPENSES FOR THE ACTIVITIES CARRIED OUT BY THE HOST ORGANISATION FOR THE BENEFIT OF THE RESEARCHER ARE ADDED TO THIS AMOUNT:

The total Community Contribution is the basis for the calculation of the management costs, whereas to calculate the overheads the total direct costs need to be known.

- Direct costs = Expenses for the activities carried out by the researcher
- Overheads = 10% direct costs
- Total Community Contribution = direct costs + overheads + management costs
- Management costs = 3% Total Community Contribution

The initial step is to calculate the overheads:

The direct costs are: **€203,068**

Since the overheads are maximum 10% of the direct costs:

Overheads: €20,306

Total Community Contribution = direct costs + overheads + management costs

In this example:

Total Comm. Contr. = **€2,03068 + €20,306 + 3% Total Comm. Contr.**

Hence:

Total Comm. Contr. = **€223,374 / 1-0.03 = €230,282**

Total Maximum Community Contribution: €230,282

The management costs are maximum 3% of the total Community contribution, hence:

Management Costs: €6,908

In summary:

Contribution	Budget (€)
Contribution for the benefit of the Researcher	203,068
Overheads	20,306
Managements	6,908
Total Community contribution	230,282

2.6. The Project Phase

Successful proposals will be invited to enter into negotiation. On the basis of the information provided and the recommendation by the independent experts, a "grant agreement" is prepared and sent to the *return host organisation* ("beneficiary"). The outgoing host does not sign any grant agreement with the Commission. The grant agreement should be signed in duplicate by the return host and sent to the Commission for signature. The *host organisation* signs an employment contract ("agreement") with the selected researcher in line with the provisions of the grant agreement. The signature of the employment contract and the start of the project will normally take place after the grant agreement enters into force, i.e. after its signature by the Commission.

Objective of the OIF action: OIF are individual fellowships that aim at reinforcing the international dimension of European researchers' careers by giving them the opportunity to develop their career through training or gaining experience at a world-class research organisation in a *Third Country*, and then to apply the experience gained in a return host institution in a MS/AS. In this regard, the accomplishment of a reintegration phase for the fellow in the European host institution is pivotal for a successful achievement of the objectives of this funding scheme.

The return clause: In the contract between the return host institution and the Commission it is therefore clearly stressed that the fellow has to undertake a **mandatory period of re-integration** at the European Host following the outgoing phase. In case of non-fulfilment of this condition, the host institution shall reimburse the total amount received from the Commission for the benefit of the researcher under this contract. The contract also stipulates that in case the responsibility of non-fulfilment of the return clause lie with the fellow, the host institution **shall take all appropriate measures (including legal actions) to recover from the researcher the total amount received** for his/her benefit under the contract, in order to reimburse this amount to the Commission.

Key aspects of the host-researcher agreement

The agreement between the *host organisation* and the researcher shall determine, in accordance with the *grant agreement*, the conditions for implementing the research training activities and the respective rights and obligations of the researcher and the host. It must indicate the amounts that s/he is entitled to receive, the conditions of implementation of the project, the law applicable, IPR arrangements and social security coverage among other issues. The requirements to be respected are included in Annex III (Specific provisions) of the *grant agreement*, which should be annexed to the agreement. Researchers are strongly encouraged to carefully read these provisions and check that their agreements comply with the rules. A copy of the model *grant agreement* is available from [CORDIS](#).

The actual fellowship must not start until the agreement/contract between the fellow and the *host organisation* is in place. This means that neither the Commission nor the *host organisation* are under any obligation to make any payments to fellows who unilaterally decide to start at an earlier date to that established in the agreement, and that fellows who take such steps do so at their own risk.

Annexed to the *agreement* there shall be a Personal Career Development Plan that should have been previously established by the fellow and his/her supervisor. This Plan comprises the fellow's training needs and scientific objectives as well as a description of all activities foreseen as part of the fellowship specific training/career development programme at the host. This Personal Career Development Plan will be part of the follow up at the different reporting stages.

Project suspension

The Commission must be informed immediately of interruptions of fellows' stays and appropriate justifications should be provided.

Split stays foreseen in Annex I of the *grant agreement* and integrated in the work plan are deemed to be approved by the Commission. In cases the researcher wants to suspend the execution of the project for personal, family or professional reasons unforeseen at the time of the signature of the *grant agreement*, a request for suspension should be submitted to the Commission.

The Commission will not object to any requests for suspension in case the fellow is entitled to maternity/parental leave established either by national law or internal rules of the *host organisation*. In all other cases, the Commission's approval of such requests will depend on the justifications provided and the impact expected on the execution of the project.

If the suspension period is less than 30% of the duration of the project, a failure to respond by the Commission within 45 days constitutes an approval of the request.

In all cases of suspension, the *grant agreement* is automatically extended by a period equal to the duration of suspension and reporting periods are adjusted accordingly.

Part-time work

In principle, fellows must work full-time on their training project. Exceptionally, part-time work and the corresponding extension of the project duration can be accepted for personal or family reasons subject to prior approval by the Commission. In such a case, the allowances should be adapted pro-rata to the time actually spent on the project. Under no circumstances can the total Community Contribution indicated in the *grant agreement* be exceeded.

Stays away from host institution

As a general rule, the project must take place at the *host organisation* premises. However, in some cases, stays away may be justified as part of collaborations or as part of the training.

As a general rule, fellows may not stay more than 30% of the duration of the fellowship away from the *host organisation* unless such stays are indispensable to the execution of the project and have been explicitly foreseen in the fellowship proposal and in the *grant agreement*.

In case details of the stay (timing, duration, location) have been explicitly provided in the original proposal and have been accepted by the Commission, they are deemed approved and there is no need to request any permission.

For stays away from the host premises not foreseen in the original proposal, permission should be requested in advance providing appropriate justifications. A written approval by the project officer responsible should be received before the stay is deemed authorised. As an exception to this rule, there is no need to request permission from the Commission for short stays (maximum 10 working days per stay) such as conference attendance, training seminars etc. provided they do not cumulatively exceed 10% of the duration of the project.

3. How to apply

3.1. Turning your idea into an effective proposal

The coordinator

The Commission refers to the participant who is taking the lead in the preparation of the proposal as the "proposal coordinator". For a given proposal, the coordinator acts as the single point of contact between the participants and the Commission. Important, before the call deadline, the fellow researcher is considered as the "proposal coordinator". However after the call deadline the *scientist in charge* will be the only single contact point. As a reminder the fellow researcher and the *scientist in charge* **cannot be the same person (refer to part A of the proposal)**.

Focusing your planned work

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

Refer also to the **evaluation criteria** against which your proposal will be assessed. These are given in Annex 2. Keep these in mind while writing your proposal.

National Contact Points

A network of National Contact Points (NCPs) has been established to provide advice and support to organisations which are preparing proposals. You are highly recommended to get in touch with your NCP at an early stage. (Contact details are given on the CORDIS Call page – see http://cordis.europa.eu/fp7/get-support_en.html or Annex 1 of this Guide).

Please note that the Commission will give the NCPs statistics and information on the outcome of the call and the outcome of the evaluation for each proposal. This information is supplied to support the NCPs in their service role, and is given under strict conditions of confidentiality.

Other sources of help

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

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

Ethical principles

Please remember that research activities in FP7 should respect fundamental ethical principles, including those reflected in the Charter of Fundamental Rights of the European Union. These principles include the need to ensure the freedom of research and the need to protect the physical and moral integrity of individuals and the welfare of animals. For this reason, the European Commission carries out an ethical review of proposals when appropriate. The following fields of research shall not be financed under this Framework Programme:

- research activity aiming at human cloning for reproductive purposes;
- research activity intended to modify the genetic heritage of human beings which could make such changes heritable⁵;
- research activities intended to create human embryos solely for the purpose of research or for the purpose of stem cell procurement, including by means of somatic cell nuclear transfer.

Concerning human embryonic stem cell research, the Commission will maintain the practice of the Sixth Framework Programme, which excludes from Community financial support research activities destroying human embryos, including for the procurement of stem cells. The exclusion of funding of this step of research will not prevent Community funding of subsequent steps involving human embryonic stem cells. For more details on ethics, please refer to Annex 4 (section B6) at the end of this document

Presenting your proposal

A proposal has two parts:

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

The information in **Part A** is entered through a set of on-line forms. Please note that you shall first enter the *return host organisation* (MS/AC) in the A2 form and then the *outgoing host organisation* in a second mandatory A2 form.

Part B is a "template", or list of headings, rather than an administrative form (see Annex 4 of this Guide). You should follow this structure when presenting the scientific and technical content of your proposal. The template is designed to highlight those aspects that will be assessed against the **evaluation criteria**. It covers, among other things, the nature of the proposed work, the participants and their roles in the proposed project, and the impacts that might be expected to arise from the proposed work.

The information given will be the basis on which the experts will evaluate the proposal, so make sure that it is precise and complete. References to web pages will not be taken into account as part of the proposal during evaluation.

Only black and white copies are used for evaluation and you are strongly recommended, therefore, not to use colour in your document.

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

A maximum length may be specified for the different sections of Part B, or for Part B as a whole (see Annex 4 of this Guide). You must keep your proposal within these

⁵ Research relating to cancer treatment of the gonads can be financed

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

Proposal language

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

3.2. Proposal submission

About the EPSS

Proposals must be submitted electronically, using the Commission's **Electronic Proposal Submission Service (EPSS)**. You can access the EPSS from <https://www.epss-fp7.org>. Proposals arriving at the Commission by any other means are regarded as 'not submitted', and will not be evaluated⁶.

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

Full instructions are found in the "EPSS preparation and submission guide", which is available from the CORDIS site (see http://cordis.europa.eu/fp7/epss_en.html).

The most important points are explained below.

Use of the EPSS system by the proposal coordinator

The EPSS refers to the participant who is taking the lead in the preparation of the proposal as the "proposal coordinator". In the case of Marie Curie Intra-European Fellowships *only one set of login and password is provided* which must then be shared between the applicant researcher and the *host organisation(s)* as appropriate.

As a coordinator you can:

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

Use of Participant Identification Codes (PICs)

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

Participants possessing a Participant Identification Code (PIC) can use this number to identify themselves in the Electronic Proposal Submission system. On entering the PIC, parts of the A forms will be filled in automatically. Please note that in the cases where a PIC is not available it will always be possible to submit a proposal by entering the organisation details manually. However, the use of PICs will lead to more efficient handling of the proposal.

The process for assigning a PIC is triggered by a self-registration of an organisation at the following website: <http://ec.europa.eu/research/participants/urf> [expected to be available by early May]. On this website you will also find a search tool for checking if your organisation is already registered (and has thus a PIC).

Referees' assessments

Up to three referees can be nominated in order to provide referees' assessments. A special facility within the EPSS system permits referees to create their assessment into the proposal. The creation of the referee happens from the "Set Up Proposal" page. Once the proposal co-ordinator (applicant) has nominated a referee the EPSS system will automatically send a login and password to the referee e-mail. Due to potential problems with SPAM however, when a mail is sent to the referee, an instruction mail is also sent to the person who has registered, requesting the applicant to crosscheck with the referee if he or she has indeed received the e-mail from the EPSS system.

When the nominated referee uploads a referee's assessment the proposal coordinator will receive an e-mail to confirm that an assessment has been uploaded but the assessment itself will not be visible to the coordinator. The referee assessments are automatically added to the proposal package by the EPSS system but will only become accessible to the Commission when (if) the proposal is submitted. Referees assessments can be submitted any time between the issue of a password and login for the referee and the call closure (even before the main proposal is submitted).

Submitting the proposal

Only the coordinator is authorised to submit the proposal.

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

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

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

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

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

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

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

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

For the proposal Part B you must use exclusively PDF ("portable document format", compatible with Adobe version 3 or higher, with embedded fonts). Other file formats will not be accepted by the system. Irrespective of any page limits specified in Annex 4 to this Guide, there is an overall limit of 10Mbyte to the size of proposal file Part B. There are also restrictions to the name you give to the Part B file. You should only use alphanumeric characters. Special characters and spaces must be avoided.

You are advised to clean your document before converting to PDF (e.g. accept any track changes). Check that your conversion software successfully converts all pages and the original document (e.g. there is no problem with page limits).

Please note that the Commission prints out proposals on plain A4 paper. The printable zone on the print engine is bounded by 1.5 cm right, left, top bottom. No scaling is applied to make the page "fit" the window. Printing is done at 300 dots per inch.

About the deadline

Proposals must be submitted on or before the deadline specified in the Call fiche.

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

Call deadlines are absolutely final and are strictly enforced

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

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

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

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

The submission of a proposal requires some knowledge of the EPSS system, a detailed knowledge of the contents of the proposal and the authority to make last-minute decisions on behalf of the consortium if problems arise.

You are advised not to delegate the job of submitting your proposal.

In the unlikely event of a failure of the EPSS service due to breakdown of the Commission server during the last 24 hours of this call, the deadline will be extended by a further 24 hours. This will be

notified by e-mail to all proposal coordinators who had registered for this call by the time of the original deadline, and also by a notice on the Call page on CORDIS (see <http://cordis.europa.eu/fp7/dc/index.cfm>) or go to the "People" programme pages (see http://cordis.europa.eu/fp7/people/home_en.html and follow the "call" link) and on the web site of the EPSS.

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

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

Correcting or revising your proposal

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

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

Ancillary material

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

Withdrawing a proposal

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

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

If you wish to withdraw a proposal after the deadline, please contact the EPSS help desk.

Multiple Submissions

Applicant **researchers** are reminded that only **one** proposal may be submitted in an evaluation procedure **at any one time** for any of the following actions (this restriction does not apply to host organisations):

- Marie Curie Intra-European Fellowships for Career Development (IEF),
- Marie Curie International Outgoing Fellowships (IOF),
- Marie Curie International Incoming Fellowships (IIF),
- Marie Curie International Reintegration Grants (IRG)
- Marie Curie European Reintegration Grants (ERG)

4. Checklist

4.1. Preparing your proposal

- **Are you applying for the right action?** Check that your proposed work falls within the scope of this call, and that you have applied for the right action⁷ (see the "People" Work Programme).
- **Is your proposal eligible?** The eligibility criteria are given in the work programme. See also section 2 of this Guide. Any proposal not meeting the eligibility requirements will be considered ineligible and will not be evaluated.
- **Is your proposal complete?** Proposals must comprise a Part A, containing the administrative information including participant (A1 – Abstract; *return host organisation* and *scientist in charge* – A2; and *outgoing host organisation* and *scientist in charge* – second mandatory A2; fellow researcher – A3) and project cost details (A4) on standard forms; and a Part B containing the scientific and technical description of your proposal as described in this Guide. A proposal that does not contain both parts will be considered ineligible and will not be evaluated. Furthermore in case of any important incoherence or inconsistency between part A and part B, the Commission may also consider the proposal ineligible and it will not be evaluated.
- If you intend to use referee's assessment to support your application (optional), **have you defined the referees well in advance so that they can submit their recommendation letter before the deadline?**
- **Does your proposed work raise ethical issues?** Clearly indicate any potential ethical, safety or regulatory aspects of the proposed research and the way they will be dealt with in your proposed project. An ethical check will take place during the evaluation and an ethical review will take place for proposals dealing with sensitive issues. Proposals may be rejected on ethical grounds if such issues are not dealt with satisfactorily. For more details on ethics, please refer to Annex 4 (sectionB6) to this call.
- **Does your proposal follow the required structure?** Proposals should be precise and concise, and must follow exactly the proposal structure described in this document (Annex 4 of this Guide), which is designed to correspond to the evaluation criteria which will be applied. This structure varies for different funding schemes. Omitting requested information will almost certainly lead to lower scores and possible rejection.
- **Have you maximised your chances?** There will be strong competition. Therefore, edit your proposal tightly, strengthen or eliminate weak points. Put yourself in the place of an expert evaluator; refer to the evaluation criteria given in Annex 2 of this Guide. Arrange for your draft to be evaluated by experienced colleagues; use their advice to improve it before submission.
- **Do you need further advice and support?** You are strongly advised to inform your National Contact Point of your intention to submit a proposal (see address in Annex 1 of this Guide). Remember the Enquiry service listed in Annex 1.

4.2. Final checks before submission

- **Do you have the agreement** of each partner in the project to submit this proposal on their behalf?
- **Is your Part A complete? Are Part A and B coherent and similar?**
- **Is your Part B in portable document format (PDF)**, including no material in other formats?
- **Is the filename made up of the letters A to Z, and numbers 0 to 9?** You should avoid special characters and spaces.
- **Have you printed out your Part B**, to check that it really is the file you intend to submit, and that it is complete, printable and readable? After the call deadline it will not be possible to replace your Part B file

⁷ If you have in error registered for the wrong call, discard that registration (usernames and passwords) and re-register and re-submit correctly. If there is no time to do this, notify the EPSS Helpdesk.

- **Is your Part B file within the size limit of 10 Mbytes?**
- **Have you virus-checked your computer?** The EPSS will automatically block the submission of any file containing a virus.

4.3. The deadline: very important!

- **Have you taken the responsibility to submit your proposal?**
- **Have you made yourself familiar with the EPSS in good time?**
- **Have you allowed time to submit a first version of your proposal well in advance of the deadline** (at least several days before), and then to continue to improve it with regular resubmissions?
- **Have you completed the submission process for your latest version**
- **Have you pressed "SUBMIT" button after your final version?**

4.4. Following submission

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

5. What happens next?

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

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

If you have not received an acknowledgement of receipt within 12 working days after the call deadline (or cut-off date, in the case of a continuously open call), you should contact the FP7 Enquiry Service without further delay (see Annex 1 of this Guide).) However, first please check that you are the person named in the proposal as contact person for partner no. 1, check the email address which you gave for yourself, and check the junk mail box of your email system for the first few days following the close of call for any mail originating from FP7Aor@ess-fp7.org.

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

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

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

If you have not received the "initial information letter" by the date referred to in Annex 1 to this Guide, please contact the Commission via the FP7 enquiry service

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

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

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

A description of the negotiation process will be provided in the "[FP7 Guidelines for negotiation](#)".

Negotiations between the applicants and the Commission aim to conclude a *grant agreement* which provides for EU funding of the proposed work. They cover both the scientific/technological, and the administrative and financial aspects of the project. The officials conducting these

negotiations on behalf of the Commission will be working within a predetermined budget envelope. They will also refer to any recommendations which the experts may have made concerning modifications to the work presented in the proposal. The negotiations will also deal with the relevant principles contained in the European Charter for researchers and the Code of Conduct for their recruitment.

Annexes

- Annex 1 Timetable and specific information for this call
- Annex 2 Evaluation criteria and procedure
- Annex 3 Instructions for completing "part A" of the proposal
- Annex 4 Instructions for drafting "part B" of the proposal

Annex 1: Timetable and specific information for this call

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

- Indicative timetable for this call**

Publication of call	19 March 2008
Deadline for submission of proposals	19 August 2008 at 17.00 Brussels local time
Evaluation of proposals	06-24 October 2008
Evaluation Summary Reports sent to proposal coordinators ("initial information letter")	End of November 2008
Invitation letter to successful coordinators to launch <i>grant agreement</i> negotiations with Commission services	December 2008
Letter to unsuccessful applicants	From December 2008
Signature of first <i>grant agreements</i>	From March 2009

- Further information and help**

The CORDIS call page: <http://cordis.europa.eu/fp7/dc/index.cfm> contains links to other sources that you may find useful in preparing and submitting your proposal. Direct links are also given where applicable.

Call information

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

General sources of help:

The Commission's FP7 Enquiry service: <http://ec.europa.eu/research/index.cfm?pg=enquiries>

National Contact Points: http://cordis.europa.eu/fp7/ncp_en.html

Specialised and technical assistance:

CORDIS help desk: http://cordis.europa.eu/guidance/helpdesk/home_en.html

EPSS Help desk: support@epss-fp7.org

IPR helpdesk: <http://www.ipr-helpdesk.org/index.html>

Legal documents generally applicable (see http://cordis.europa.eu/fp7/find-doc_en.html)

Decision on the Framework Programme: *Decision* No 1982/2006/EC of the European Parliament and of the Council of 18 December 2006 concerning the Seventh Framework Programme of the European Community for research, technological development and demonstration activities (2007-2013), available in all Community languages

Rules for Participation: Regulation (EC) No 1906/2006 of the European Parliament and of the Council of 18 December 2006 laying down the rules for the participation of undertakings, research centres and universities in actions under the Seventh Framework Programme and for the dissemination of research results (2007-2013), available at http://ec.europa.eu/research/fp7/index_en.cfm?pg=documents)

Specific Programmes at http://cordis.europa.eu/fp7/home_en.html

Rules for proposal submission, evaluation selection and award at
http://cordis.europa.eu/fp7/participate_en.html

Other supporting information

Brochure “**The FP7 in Brief**” can be downloaded from the Europa web site at
http://ec.europa.eu/research/fp7/pdf/fp7-inbrief_en.pdf

The **European Charter for Researchers** and the **Code of Conduct** for their recruitment can be downloaded from http://ec.europa.eu/eracareers/pdf/am509774CEE_EN_E4.pdf

International cooperation on CORDIS at <http://cordis.europa.eu/inco/>

Ethical

A dedicated website that aims to provide clear, helpful information on ethical issues is now available at: http://cordis.europa.eu/fp7/ethics_en.html

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

1. General

The evaluation of proposals is carried out by the Commission with the assistance of independent experts.

Commission staff ensures that the process is fair, and in line with the principles contained in the Commission's rules⁸.

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

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

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

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

2. Before the evaluation

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

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

⁸ Rules on Proposal Submission, Evaluation, Selection and Award Procedures (CORDIS)

a) in possession of a doctoral degree (independently of the time taken to complete the doctoral studies) **or**

b) have at least four years of full-time equivalent research experience, including the period of research training, after obtaining the degree/diploma which formally allowed them to embark on a doctorate in the country in which the degree/diploma was obtained (irrespective of whether or not a doctorate was envisaged);

- The researchers are nationals of a Member State or Associated country;
- At the deadline for submission of proposals, researchers must not have resided or carried out their main activity (work, studies, etc.) in the country of the outgoing *host organisation* for more than 12 months in the 3 years immediately prior to the Call deadline.

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

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

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

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

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

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

Commission staff allocates proposals to individual experts, taking account of the fields of expertise of the experts, and avoiding conflicts of interest.

3. Individual evaluation of proposals

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

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

The proposal will be evaluated against the following evaluation criteria.

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

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

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

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

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

Evaluation Criterion	Weighting (in %)	Threshold
S&T Quality	25	3
Training	15	3
Researcher	25	4
Implementation	15	N/A
Impact	20	N/A

In addition to the individual thresholds for the first three criteria, an overall threshold of 70% will be applied to the total weighted score.

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

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

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

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

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

The experts will also indicate whether, in their view, the proposal deals with sensitive ethical issues,

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

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

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

4. Consensus meeting

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

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

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

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

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

Ethical issues (above threshold proposals)

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

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

The Commission may decide to submit any of the proposals in the funding range to a specific ethical review panel. Projects raising specific ethical issues such as research intervention on human beings; research on human embryos and human embryonic stem cells and non-human primates are automatically submitted for ethical review.

Outcome of consensus

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

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

The signing of the consensus report completes the consensus step.

Evaluation of a resubmitted proposal

In the case of proposals that have been submitted previously to the Commission, the moderator gives the experts the previous evaluation summary report (see below) at the consensus stage. If necessary, the experts will be required to provide a clear justification for their scores and comments should these differ markedly from those awarded to the earlier proposal.

5. Panel review

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

The panels are organised according to the scientific disciplines and comprise experts involved at the consensus step. The tasks of the panel will also include:

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

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

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

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

The panel report is signed by at least three panel experts, including the panel Rapporteur and the chairperson. A further special ethical review of above-threshold proposals may be organised by the Commission.

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

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

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

Section A1 gives a snapshot of your proposal, section A2 concerns the *host organisation*⁹, section A3 gives details of the applicant researcher, while section A4 deals with financial matters.

How to complete the forms (A1 to A4)?

How to complete the forms (A1 to A4)?

When you complete part A, please make sure that:

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

Note: The eligibility will be performed on the information provided in the Part A of the proposal. Furthermore in case of any important incoherence or inconsistency between part A and part B, the Commission may also consider the proposal ineligible and will not be evaluated. All fields shall be filled.

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

⁹ In case of a possible return phase the identified return host organisation must be clearly stated in the part A2 of the proposal submission form after the incoming host organisation (and different from the incoming host organisation) and in the part A4

Section A1 – Information on the Proposal	
Proposal number	[pre-filled]
Proposal Acronym	The short title or acronym will be used to identify your proposal efficiently in this call. It should be of <u>no more than 20 characters</u> (use standard alphabet and numbers only; no symbols or special characters please). The same acronym should appear on each page of part B of your proposal.
Proposal Title	The title should be <u>no longer than 200 characters</u> and should be understandable to the non-specialist in your field.
Marie Curie Action code	This field will be pre-filled with the code corresponding to the action of the call: Networks for Initial Training (ITN) Industry-Academia Partnerships and Pathways (IAPP) Co-funding of Regional, National and International Programmes (COFUND) Intra-European Fellowships (IEF) European Re-integration Grants (ERG) International Outgoing Fellowships (IOF) International Incoming Fellowships (IIF) International Re-integration Grants (IRG) Marie Curie Awards (AWARDS)
Scientific Panel	Please choose a code from the list below indicating the main scientific area of relevance to your proposal. This information will help the Commission in the organisation of the evaluation of proposals. Chemistry CHE Social and Human Sciences SOC Economic Sciences ECO Information science and Engineering ENG Environment and geosciences ENV Life sciences LIF Mathematics MAT Physics PHY * To help you select the most relevant panel code please refer also the breakdown of each scientific area into a number of sub-disciplines at the end of this section
Total Duration in months	Insert the estimated duration of the project in full months.
Call identifier	[pre-filled] The call identifier is the reference number given in the call or part of the call you are addressing, as indicated in the publication of the call in the Official Journal of the European Union, and on the CORDIS call page. A call identifier looks like this: <i>FP7-PEOPLE-IOF-200X</i>
Keywords	Please enter a number of keywords that you consider sufficient to characterise the scope of your proposal. There is <u>a limit of 100 characters</u> . Please select at least two keywords from the drop-down list and/or add free keywords.
Abstract	The abstract should, at a glance, provide the reader with a clear understanding of the objectives of the proposal, how they will be achieved, and their relevance to the Work Programme. This summary will be used as the short description of the proposal in the evaluation process and in communications to the programme management committees and other interested parties. It must therefore be short and precise and should not contain confidential information. Please use plain typed text, avoiding formulae and other special characters. If the proposal is written in a language other than English, , please write the proposal abstract in English. There is <u>a limit of 2000 characters</u> .
Similar proposals	A 'similar' proposal or contract is one that differs from the current one in minor ways.
Ethical Issues in Part B	Please choose YES or NO on the following basis: In the Part B Proposal Description you are asked to describe any ethical issues that may arise in your proposal and to fill in the table "RESEARCH ETHICAL ISSUES". If your proposal involves any of the sensitive ethical issues detailed in the table, please choose YES in this field. If not, choose 'NO'. This information will be used by the Commission to flag proposals with potential ethical issues that need further follow-up (but not necessarily a formal ethical review).

Scientific Panels - Sub-disciplines

To help you in selecting the most relevant panel code please find below a breakdown of each scientific area:

CHEMISTRY (CHE)

- Biological, Pharmaceutical and Medicinal Chemistry
- Environmental Chemistry
- Homogeneous and Heterogeneous Catalysis
- Instrumental Techniques, Analysis, Sensors
- Molecular Aspects of New Materials, Macromolecules, Supramolecular Structures, Nanochemistry
- New Synthesis, Combinatorial Chemistry
- Reaction Mechanisms and Dynamics
- Surface Science and Colloids
- Theoretical and Computational chemistry
- Other Chemistry

SOCIAL & HUMAN SCIENCES (SOC)

- Education and Training
- Law (European or Comparative National)
- Linguistics (applied to: Education, Industrial Efficiency or Social Cohesion)
- Media and Mass Communication
- Political Sciences (European or Comparative National)
- Psychology (Social, Industrial, Labour, or Education)
- Sociology
- Other Social and Human Sciences

ECONOMIC SCIENCES (ECO)

- Financial Sciences
- Industrial Economics (incl. Technology & Innovation)
- International Economics
- Labour Economics
- Macroeconomics
- Management of Enterprises (incl. Marketing)
- Microeconomics
- Natural Resources & Environmental Economics
- Public Sector Economics
- Quantitative Methods
- Research Management
- Social Economics
- Urban & Regional Economics (incl. Transport Economics)
- Other Economic Sciences

ENGINEERING & INFORMATION SCIENCE (ENG)

- Automation, Computer Hardware, Robotics
- Bioengineering
- Chemical Engineering
- Civil Engineering
- Computer Graphics, Human Computer Interaction, Multimedia
- Electrical Engineering
- Electronics
- Information Systems, Software Development and Databases
- Knowledge Engineering and Artificial Intelligence
- Materials Engineering
- Mechanical Engineering
- Parallel and Distributed Computing, Computer Architecture
- Signals, Speech and Image Processing
- Systems, Control, Modelling & Neural Networks
- Telecommunications
- Transport Engineering
- Other Engineering and Information Science

ENVIRONMENT & GEOSCIENCES (ENV)

- Agriculture, Agroindustry and Forestry
- Biodiversity and Conservation
- Climatology, Climate Change, Meteorology and Atmospheric Processes

- Ecology and Evolution (incl. Population Biology)
- Environmental Engineering and Geotechnics
- Fisheries and Aquaculture
- Geochemistry and Mineral Sciences
- Geophysics, Tectonics, Seismology, Volcanology
- Marine Sciences
- Natural Resources Exploration and Exploitation
- Physical Geography, Earth Observation and Remote Sensing
- Pollution, Waste Disposal and Ecotoxicology
- Soil and Water Processes
- Stratigraphy, Sedimentary Processes and Palaeontology
- Other Environment and Geosciences

LIFE SCIENCES (LIF)

- Bioenergetics
- Biological Membranes
- Biomedicine, Public Health & Epidemiology
- Cancer Research
- Cell Biology
- Computational Biology and Bioinformatics
- Developmental Biology
- Enzymology
- Genetic Engineering
- Genomics and General Genetics
- Immunology
- Macromolecular Structures and Molecular Biophysics
- Medical Pathology
- Metabolic Regulation and Signal Transduction
- Metabolism of Cellular Macromolecules
- Microbiology and Parasitology
- Neurosciences (incl. Psychiatry and Clinical Psychology)
- Pharmacology and Toxicology
- Physiology
- Virology
- Other Life Sciences

MATHEMATICS (MAT)

- Algebra and Number Theory
- Algorithms and Complexity
- Analysis and Partial Differential Equations
- Applied Mathematics and Mathematical Physics
- Discrete Mathematics and Computational Mathematics
- Geometry and Topology
- Logic and Semantics
- Statistics and Probability
- Other Mathematics

PHYSICS (PHY)

- Astronomy, Astrophysics and Cosmology
- Atomic and Molecular Physics
- Biophysics and Medical Physics
- Condensed Matter- Electronic Structures, Electrical and Magnetic Properties
- Condensed Matter- Mechanical and Thermal Properties
- Condensed Matter- Optical and Dielectric Properties
- Elementary Particles and Fields
- Fluids and Gases
- Non Linear Dynamics and Chaos Theory
- Nuclear Physics
- Optics and Electromagnetism
- Physical Chemistry, Soft Matter and Polymer Physics
- Physics of Superconductors
- Plasmas and Electric Discharges
- Statistical Physics and Thermodynamics
- Surface Physics
- Other Physics

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

Entity composed of one or more legal entities	European Economic Interest Groups, Joint Research Units, Enterprise Groupings, Decision DL/2003/3188 27.11.2003
Commercial Enterprise	Organisations operating on a commercial basis, i.e. companies gaining the majority of their revenue through competitive means with exposure to commercial markets, including incubators, start-ups and spin-offs, venture capital companies, etc.
NACE code	NACE means " <u>N</u> omenclature des <u>A</u> ctivités économiques dans la <u>C</u> ommunauté <u>E</u> uropéenne". Please select one activity from the list that best describes your professional and economic ventures. If you are involved in more than one economic activity, please select the one activity that is most relevant in the context of your contribution to the proposed project. For more information on the methodology, structure and full content of NACE (rev. 1.1) classification please consult EUROSTAT at: http://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_CLS_DLD&StrNom=NACE_1_1&StrLanguageCode=EN&StrLayoutCode=HIERARCHIC .
Small and Medium-Sized Enterprises (SMEs)	SMEs are micro, small and medium-sized enterprises within the meaning of Recommendation 2003/361/EC in the version of 6 May 2003. The full definition and a guidance booklet can be found at http://ec.europa.eu/enterprise/enterprise_policy/sme_definition/index_en.htm To find out if your organisation corresponds to the definition of an SME you can use the on-line tool at http://ec.europa.eu/research/sme-techweb/index_en.cfm
Contact point	It is the main scientist or team leader in charge of the proposal for the participant. For participant number 1 (the coordinator), this will be the person the Commission will contact concerning this proposal (e.g. for additional information, invitation to hearings, sending of evaluation results, convocation to negotiations).
Authorised representative to sign the grant agreement or to commit the organisation for this proposal	Please indicate the contact details of the person in the <i>host organisation</i> who would be authorised to sign the grant agreement with the Commission in case the proposal is selected for funding.
Title	Please choose one of the following: Prof., Dr., Mr., Mrs., Ms.
Sex	This information is required for statistical and mailing purposes. Indicate Female or Male as appropriate.
Phone and fax numbers	Please insert the full numbers including country and city/area code. Example +32-2-2991111.

Section A3 – Information on the Researcher:	
Location of origin (country)	The country in which the location of origin is situated (see below). Insert the name of the country as commonly used.
Location of origin (town)	The place where the <i>researcher</i> was residing or carrying out his/her main activity at the time of the relevant deadline for submission of the proposal unless he/she has resided or carried out his/her main activity for less than 12 months in this location immediately prior to this date. In the latter case, the location of origin is the capital city of the country of his/her nationality (in case of a <i>researcher</i> holding more than one nationality, the location of origin is the capital city of the country where the <i>researcher</i> was residing for the longest period during the last 5 years prior to the relevant deadline for submission of the proposal).
Contact address	Fill in only the fields forming your complete postal address. If your address is specified by an indicator of location other than a street name and number, please insert this instead under the "street name" field and "N/A" under the "number" field Please make sure that the email address given will still be valid for at least a year after the deadline.
University degree	Date of award of a degree which entitles the holder to embark on doctoral studies in the country in which the degree was obtained or in the host country, without having to acquire any further qualifications. Wrong or missing information may cause your proposal to be ineligible.
Doctorate expected before the deadline	If you do not yet have a doctoral degree and expect to have it before the deadline, please indicate the expected date of award. Researchers must have obtained a doctoral degree at the latest on the date of the relevant deadline for submission of proposals or have at least 4 years of research experience on the date of the relevant deadline for submission of proposals. Wrong or missing information may cause your proposal to be ineligible.
Doctorate	Please specify the date of award of a doctoral degree using the format (DD/MM/YYYY). Wrong or missing information may cause your proposal to be ineligible
Full-time postgraduate research experience	The information provided in this field should reflect the researcher's full-time post graduate research experience at the time of the relevant deadline for submission of the proposal. Post-graduate refers to a degree which entitles the holder to embark on doctoral studies without having to acquire any further qualifications. Only time spent on post graduate research activities (whether remunerated or not, and including the period of research training e.g. PhD period) should be included. If an applicant has been engaged in other professional activities than research in certain periods since his/her graduation, this time will not count as 'full-time post graduate research experience'. Any periods of part-time activity in research should be translated into full-time experience (e.g. 3 years half time = 1,5 years full-time). Please note that the proposer may be asked to produce evidence of this experience at any stage. Wrong or missing information may cause your proposal to be ineligible.
Place of activity/place of residence (previous 5 years)	Indicate the period(s) and the country/countries in which you have legally resided and/or had your main activity (work, studies...) during the last 5 years up until the deadline for the submission of the proposal. <u>The 5 years prior to the deadline must be covered.</u> Wrong or missing information may cause your proposal to be ineligible. Any additional information you wish to make known to the evaluators should be included in the Part B (proposal description/CV).
Period	Indicate the starting date and the end date of each period using the format: DD/MM/YYYY, starting with the most recent period. The first date must be the call deadline. <u>There must be no gaps between the periods</u>

<p>Have you submitted or are you in the process of submitting another proposal for Marie Curie actions IEF, IOF, IIF, ERG or IRG, or have you previously benefited of Community funding under Marie Curie actions?</p>	<p>Each researcher may only submit one proposal at a time for the following actions:</p> <ul style="list-style-type: none"> • Marie Curie Intra-European Fellowships (IEF), • Marie Curie Outgoing International Fellowships (IOF), • Marie Curie Incoming International Fellowships (IIF), • Marie Curie European Reintegration Grants (ERG) • Marie Curie International Reintegration Grants (IRG) <p>Having several proposals in the application procedure for one or more actions at the same time may render your proposal ineligible. New or similar proposals are eligible to be submitted only after the evaluation procedure of the relevant round has been terminated.</p> <p>If you have previously benefited of Community funding under Marie Curie actions in the same field, you should demonstrate (in part B) the substantial added value of the new project.</p> <p>Indicate here the action name, year and the proposal or contract number.</p>
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Section A4 – Funding Request IOF	
<p>Type B Fixed-amount fellowship (Y/N)</p>	<p>The <i>host organisation</i> can recruit the researcher either under an employment contract/fellowship with full social security coverage or on a fixed-amount fellowship with minimum social security (Type B). More information concerning the choice can be found in Annex 3 of the Work Programme. Please indicate here if you choose the Type B Fixed-amount fellowship. Please note that in the latter case the allowance for the researcher will be lower.</p>
<p>Mobility allowance</p>	<p>Only researchers who will undertake a trans-national mobility, i.e. move from one country to another, at the start of the project or who have undertaken such a mobility within the last 12 months before the deadline for the submission of proposals are entitled to a mobility allowance.</p> <p>Family related mobility allowance refers to a researcher with a spouse and/or children. Please see the definition in Annexe 3 of the Work Programme. The reference date for family situation is the relevant deadline for submission of proposals.</p> <p>Please indicate your eligibility status by inserting YES or NO in the boxes.</p>
<p>Travel allowance</p>	<p>Please indicate the estimated direct distance ("as the crow flies") between the location of origin and the <i>host organisation</i> premises.</p> <p>Please indicate the name of the cities for the location of the <i>host organisation</i> premises and for the location of origin.</p>
<p>Research classified as laboratory based</p>	<p>Please indicate if you consider your project to be laboratory based. A project is laboratory based if there are costs associated with the proposal beyond those of a purely theoretical study which is executed with office based equipment. Activities such as field trips, expensive computer run-time, supply of chemicals or costs associated with working in a laboratory can be considered as such costs.</p> <p>Information concerning this aspect of the proposal must be clearly presented in the part B.</p>
<p>Post-graduate Research Experience of the applicant</p>	<p>Please choose between the 3 categories to indicate the full-time research experience of the applicant at the deadline of the call: less than 4 years (<4 years), from 4 up to 10 years (4-10 years), or more than 10 years (>10 years).</p>

Proposal Submission Forms



EUROPEAN COMMISSION
7th Framework Programme on
Research, Technological
Development and Demonstration

Marie Curie Actions
International Outgoing Fellowships (IOF)

A1

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

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

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

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



EUROPEAN COMMISSION
7th Framework Programme on
Research, Technological
Development and Demonstration

Marie Curie Actions
International Outgoing Fellowships (IOF)

A2

Proposal Nr	Proposal Acronym	Participant Nr
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INFORMATION ON ORGANISATIONS

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

Administrative data

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

Status of your organisation

Certain types of organisations benefit from special conditions under the FP7 participation rules. The Commission also collects data for statistical purposes. The guidance notes will help you complete this section. Please 'tick' the relevant box(es) if your organisation falls into one or more of the following categories.

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

The following section relating to the status of Small or Medium Sized Enterprises is to be completed only by the participants having chosen NONE of the options in the first section under "Status of your organisation"

1. Is your number of employees smaller than 250? (full time equivalent)	[yes/no]
2. Is your annual turnover smaller than € 50 million?	[yes/no]
3. Is your annual balance sheet total smaller than € 43 million?	[yes/no]
4. Are you an autonomous legal entity?	[yes/no]
You are not an SME if your answer to question 1 is "NO" and/or your answer to both questions 2 and 3 is "NO". In all other cases, you might conform to the Commission's definition of an SME. Please check the additional conditions given in Annex X.	
Following this check, do you conform to the Commission's definition of an SME	[yes/no]

Proposal Submission Forms



EUROPEAN COMMISSION
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Research, Technological
Development and Demonstration

Marie Curie Actions
International Outgoing Fellowships (IOF)

A2

Dependencies with (an)other participant(s)

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

Contact points

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

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

Proposal Submission Forms



EUROPEAN COMMISSION
7th Framework Programme on
Research, Technological
Development and Demonstration

Marie Curie Actions
International Outgoing Fellowships (IOF)

A3

<i>Proposal Number</i>		<i>Proposal Acronym</i>	
INFORMATION ON THE RESEARCHER			
<i>Family Name</i>		<i>Birth Family Name</i>	
<i>First Name(s)</i>			
<i>Title</i>		<i>Sex Female(F)/Male(M)</i>	
<i>1st nationality</i>		<i>2nd nationality</i>	
<i>Location of origin (country)</i>		<i>Date of birth</i>	
<i>Location of origin (town)</i>			
Contact address			
<i>Street name</i>		<i>Number</i>	
<i>Town</i>			
<i>Postal Code / Cedex</i>			
<i>Country</i>			
<i>Phone 1</i>		<i>Phone 2</i>	
<i>E-mail</i>		<i>Fax</i>	

Qualifications		
<i>University degree</i>	<i>Date of award (DD/MM/YYYY)</i>	
<i>Doctorate expected before the deadline</i>	<i>Expected date of award (DD/MM/YYYY)</i>	
<i>Doctorate</i>	<i>Date of award (DD/MM/YYYY)</i>	
<i>Full-time postgraduate research experience</i>	<i>Number of months</i>	
<i>Other academic qualifications</i>	<i>Date of award (DD/MM/YYYY)</i>	

Place of activity/place of residence (previous 5 years)		
<i>Period: From DD/MM/YYYY</i>	<i>To DD/MM/YYYY</i>	<i>Country</i>

INVOLVEMENT OF THE RESEARCHER IN OTHER MARIE CURIE PROPOSALS	
<i>Have you submitted or are you in the process of submitting another proposal for the Marie Curie Actions: IEF, IOF, IIF, ERG or IRG, or have you previously benefited of Community funding under Marie Curie actions ?</i>	YES/NO
<i>If yes:</i>	
<i>Action name(s) and year</i>	<i>Proposal or contract number(s)</i>

Proposal Submission Forms



EUROPEAN COMMISSION
7th Framework Programme on
Research, Technological Development
and Demonstration

Marie Curie Actions
International Outgoing Fellowships (IOF)

A4

Proposal Number		Proposal Acronym	
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FUNDING REQUEST				
Year	Main Phase		Return Phase (IIF and IOF only)	
	Full-time person-months	Type B Fixed-amount Fellowship (Y/N)	Full-time person-months	Type B Fixed-amount Fellowship (Y/N)
1				
2				
3				
Total				

Mobility allowance		
Are you eligible for a mobility allowance?	YES/NO	
If yes, are you eligible for the family-related mobility allowance?	YES/NO	

Travel allowance	
Indicate the estimated distance (in km) between your location of origin and the premises of the Host	
Location of Host (town)	
Location of Origin (town)	

Research classified as Laboratory-based	YES/NO	
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Post-graduate Research Experience of the applicant at the deadline of the call
(<4 years; 4-10 years; >10 years)

Annex 4 - Instructions for drafting "part B" of the OIF proposal

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

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

The **maximum length** of part B is **25 pages** (excluding table of contents; the ethical issues section as well as start and end pages).

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

Please make sure that:

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

STARTPAGE

PEOPLE
MARIE CURIE ACTIONS

International Outgoing Fellowships (IOF)
Call: FP7-PEOPLE-IOF-2008

PART B

“PROPOSAL ACRONYM”

Table of Contents

To draft PART B of proposals applicants should take into account the following structure. If required for an adequate description of their project, applicants may wish to add further headings.

B1 SCIENTIFIC AND TECHNOLOGICAL QUALITY

- Scientific and technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal
- Research methodology
- Originality and Innovative nature of the project, and relationship to the 'state of the art' of research in the field
- Timeliness and relevance of the project
- Host scientific expertise in the field (outgoing and return host)
- Quality of the group/supervisors (outgoing and return host)

B2 TRAINING

- Clarity and quality of the research training objectives for the researcher
- Relevance and quality of additional scientific training as well as of complementary skills offered
- Host expertise in training experienced researchers in the field and capacity to provide mentoring/tutoring (outgoing and return host)

B3 RESEARCHER

- Research experience
- Research results including patents, publications, teaching etc., taking into account the level of experience
- Independent thinking and leadership qualities
- Match between the fellow's profile and project
- Potential for reaching a position of professional maturity
- Potential to acquire new knowledge

B4 IMPLEMENTATION

- Quality of infrastructure / facilities and international collaboration of host (outgoing and return host)
- Practical arrangements for the implementation and management of the project (outgoing and return host)
- Feasibility and credibility of the project, including work plan
- Practical and administrative arrangements and support for the hosting of the fellow (outgoing and return host)

B5 IMPACT

- 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
- Contribution to career development or re-establishment
- Potential for creating long term collaborations and mutually beneficial cooperation between Europe and the *Third Country*.
- Contribution to European excellence and European competitiveness

B6 ETHICAL ISSUES

B1. SCIENTIFIC AND TECHNOLOGICAL QUALITY (maximum 8 pages)**Scientific and technological quality, including any interdisciplinary and multidisciplinary aspects of the proposal**

Outline the research objectives against the background of the state of the art, and the results hoped for. Give a clear description of the state-of-the-art of the research topic. Describe the scientific, technological or socio-economic reasons for carrying out further research in the field covered by the project. If relevant, provide information on interdisciplinary / multidisciplinary and/or inter-sectorial aspects of the proposal.

Research methodology

For each objective explain the methodological approach that will be employed in the project and justify it in relation to the overall project objectives. When any novel methods or techniques are proposed, explain their advantages and disadvantages.

Originality and Innovative nature of the project, and relationship to the 'state of the art' of research in the field

Explain the contribution that the project is expected to make to advance the state-of-the-art within the project field. Describe any novel concepts, approaches or methods that will be employed.

Timeliness and relevance of the project

Describe the appropriateness of the research proposed against the state of the art and outline the benefit that will be gained from undertaking the project at Community level and how the fellowship will contribute to enhance EU scientific excellence and reintegrate the researcher.

Host scientific expertise in the field (outgoing and return host)

The host institutions (outgoing and return phase) must explain their level of experience on the research topic proposed and document their track record of work, including all international collaborations. Information provided should include participation in projects, publications, patents and any other relevant results. Similar information should be provided for the *scientist in charge* of the supervision of the project. Where relevant, show that any gender issues associated to the proposal have been adequately taken into account.

Quality of the group/supervisors (outgoing and return host)

The host institutions must demonstrate their track record of previous training achievements especially at an advanced level within the field of research.

B2. TRAINING (maximum 2 pages)**Clarity and quality of the research training objectives for the researcher**

Explain in detail which will be the training objectives of the proposal and how these can be beneficial for the development of an independent research career.

Relevance and quality of additional scientific training as well as of complementary skills offered

Explain how the training provided will contribute to adding different/complementary scientific competencies to the career of the fellow. Outline complementary training and skills expected during the execution of the project (such as research management, presentation skills, ethics, etc.).

Host expertise in training experienced researchers in the field and capacity to provide mentoring/tutoring (outgoing and return host)

Give a short outline of the host's (outgoing and return phase) expertise in mentoring/tutoring researchers

B3. RESEARCHER (maximum 7 pages which includes a CV and a list of main achievements)**Research experience**

The applicant must present a comprehensive description of his/her research experience.

A scientific/professional CV must be provided and should mention explicitly:

- academic achievements
- list of other professional activities
- any other relevant information

Research results including patents, publications, teaching etc., taking into account the level of experience

Outline the major achievements of the researcher. These may also include results in the form of funded projects, publications, patents, reports, invited participation in conferences etc., taking into account the level of experience. To help the expert evaluators better understand the level of skills and experience it is advisable to write a short description (250 words) of maximum three of the major accomplishments mentioning the purpose, results, skills acquired, derived applications etc.

Independent thinking and leadership qualities

Describe the activities that reflect initiative, independent thinking, project management skills and leadership since these are qualities that will be taken into account in the evaluation. Outline the potential for future development of the applicant.

Match between the fellow's profile and project

Show that the applicant's skills and experience are suitable for the project proposed.

Potential for reaching a position of professional maturity

Describe the researcher's ability to acquire a position of professional maturity.

Potential to acquire new knowledge

Describe the researcher's ability to acquire new knowledge and skills.

B4. Implementation (maximum 6 pages)**Quality of infrastructure / facilities and international collaboration of host (outgoing and return host)**

The proposal must explain the level of experience of the outgoing host institution on the research topic proposed, including all international collaborations (outgoing and return host). Information provided should include participation in projects, publications, patents and any other relevant results.

The facilities available in both the outgoing and returning host and their adequacy to the research project should be mentioned.

Information on the capacity to provide training in complementary skills that can further aid the fellow in the reintegration period should be included. The host needs to specify what are the infrastructures available and whether these can respond to the needs set by the execution of the project.

The European return host's qualities and capabilities to absorb and make use of the experience gained by the returning fellow should be described.

Practical arrangements for the implementation and management of the project (outgoing and return host)

The applicant and the host institutions for both phases (outgoing and return) must be able to provide information on how the implementation and management of the fellowship will be achieved. The experts will be examining the practical arrangements that can have an impact on the feasibility and credibility of the project.

Feasibility and credibility of the project, including work plan

Provide a work plan that includes the goals that can help assess the progress of the project. Mention the arrangements made in terms of supporting the reintegration phase of the fellow providing a career development plan where applicable. Where appropriate, describe the approach to be taken regarding the intellectual property that may arise from the research project.

Practical and administrative arrangements and support for the hosting of the fellow (outgoing and return host)

The host of the outgoing phase should describe what practical arrangements are in place to host a researcher coming from another country. What support will be given to him/her to settle into their new host country (in terms of language teaching, help with local administration, obtaining of permits, accommodation, schools, childcare etc.) The host of the return phase should explain which measures are planned for the successful re-integration of the researcher.

B5. IMPACT (maximum 2 pages)

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

Describe the fellow's potential of acquiring (complementary) competencies and skills during the fellowship and which impact this will have on the prospects of reaching and/or reinforcing a position of professional maturity, diversity and independence.

Explain how the newly acquired skills and knowledge will be transferred from the *Third Country* to the return host

Contribution to career development or re-establishment

How will the fellowship contribute in the medium- and long-term to the development of the Fellow's career?

In the case of a fellow returning to research, how will his/her re-establishment be helped by the fellowship?

Potential for creating long term collaborations and mutually beneficial co-operation between Europe and the *Third Country*

What is the likelihood of continuing the collaboration between the two hosts after the end of the fellowship?

Contribution to European excellence and European competitiveness

How will the fellowship contribute to the European excellence and European competitiveness?

B6. ETHICAL ISSUES

Describe any ethical issues that may arise in the proposal. In particular, you should explain the benefit and burden of the experiments and the effects these may have on the research subject. The following special issues should be taken into account:

Informed consent: When describing issues relating to informed consent, it will be necessary to illustrate an appropriate level of ethical sensitivity, and consider issues of insurance, incidental findings and the consequences of individuals leaving the study prematurely.

Data protection issues: Avoid the unnecessary collection and use of personal data. Identify the source of the data, describing whether it is collected as part of the research or is previously

collected data being used. Consider issues of informed consent for any data being used. Describe how personal identity of the data is protected.

Use of animals: Where animals are used in research the application of the 3Rs (Replace, Reduce, Refine) must be convincingly addressed. Numbers of animals should be specified. Describe what happens to the animals after the research experiments.

Human embryonic stem cells: Research proposals that will involve human embryonic stem cells (hESC) will have to address all the following specific points:

- the necessity to use hESC in order to achieve the scientific objectives set forth in the proposal.
- whether the applicants have taken into account the legislation, regulations, ethical rules and/or codes of conduct in place in the country(ies) where the research using hESC is to take place, including the procedures for obtaining informed consent;
- the source of the hESC
- the measures taken to protect personal data, including genetic data, and privacy;
- the nature of financial inducements, if any.

Identify the countries where research will be undertaken and which ethical committees and regulatory organisations will need to be approached during the life of the project.

Include the Ethical issues table below. If you indicate YES to any issue, please identify the pages in the proposal where this ethical issue is described. Answering 'YES' to some of these boxes does not automatically lead to an ethical review. It enables the independent experts to decide if an ethical review is required. If you are sure that none of the issues apply to your proposal, simply tick the YES box in the last row.

(No maximum length for Section B.6: Depends on the number of such issues involved)

Notes:

Any ethical review will be performed solely on the basis of the information available in the proposal. Only in exceptional cases will additional information be sought for clarification. Projects raising specific ethical issues such as research intervention on human beings¹⁰; research on human embryos and human embryonic stem cells and non-human primates are automatically submitted for ethical review.

To ensure compliance with ethical principles, the Commission Services will undertake ethics audit(s) of selected projects at its discretion.
A dedicated website that aims to provide clear, helpful information on ethical issues is now available at: http://cordis.europa.eu/fp7/ethics_en.html

Ethics is central to scientific integrity, honesty and clarity of science. It is considered essential by the European Commission in the research activities that it funds or carries out itself. This means that in any proposal submitted to the 7th Framework programme, ethics issues must be identified and addressed. Proposals that pose ethics concerns will be flagged. If some aspects are incomplete, clarification may be sought, but this will cause delays in the application process.

Considering ethics issues from the concept stage of a proposal enhances the quality of research. Applicants should take time to consider the benefit/burden balance of each work package; consider the impact of the research, not only in terms of scientific advancement, but also in terms of human dignity and social and cultural impact; consider elements such as the ethics and social impact of the research and whether there is a balance between the objectives and the means.

The following special issues should be taken into account:

¹⁰ Such as clinical trials, and research involving invasive techniques on persons (e.g. taking of tissue samples, examinations of the brain).

ETHICS REVIEW AND THE REVIEWERS

Ethics review aims to prevent Community funding being used for research activities that contravene fundamental rights.

- Reviewers are selected on the basis of their expertise.
- Reviewers must first register online on CORDIS.
- Reviewers have a wide range of skills. They include doctors, biologists and clinicians, ethicists, lawyers.
- Gender balance is promoted.
- Reviewers come from the European Union and other countries.

Every proposal gets a report outlining the views of the reviewers. No marks are given, but if the proposal is unclear on ethics issues, clarification may be asked for.

ETHICS REVIEW IS AUTOMATIC IF A PROPOSAL INCLUDES:

- Interventions on human beings;
- The use of human embryonic stem cells (hESC); and/or
- The use of non-human primates.

Ethics Review may be necessary if the proposal is flagged by the scientific expert as raising specific ethics issues.

MAIN ETHICS ISSUES THAT MUST BE ADDRESSED

- Informed consent
- Human embryonic stem cells
- Privacy and data protection
- Use of human biological samples and data
- Research on animals
- Research in developing countries
- Dual use

AREAS EXCLUDED FROM FUNDING

- Research activity aiming at human cloning for reproductive purposes.
- Research activity intended to modify the genetic heritage of human beings which could make such changes heritable (Research related to cancer treatment of the gonads can be financed).
- Research activities intended to create human embryos solely for the purpose of research or for the purpose of stem cell procurement, including by means of somatic cell nuclear transfer.

MAJOR CHANGES FROM FP6 TO FP7

The Ethic Review will be carried out on the proposal as it is submitted.

- No additional information will be requested at Ethical Review.
- Drafts of Information Sheet and Consent Form have to be submitted.
- No need to submit copies of legislation.

INFORMED CONSENT

When is it needed?

- When children are involved
- Healthy volunteers
- Human genetic material
- Human biological samples
- Human data collection

WHAT MUST BE IN A CONSENT FORM?

A statement that this is a research project.

- The purpose of the research, the duration, procedures to be used and identification of any experimental procedure.
- A description of the foreseen risks and benefits to be included.
- A statement describing the extent to which confidentiality of records identifying the subject will be maintained.
- A disclosure of any alternative procedures that might be beneficial.
- For research involving more than minimal risk, an explanation as to whether there are any treatments or compensation if injury occurs and if so what they consist of or where further information can be obtained.
- Identify the contact person for answers to questions about the research and research subject's rights, and whom to contact in the event of injury to the subject.
- A statement that participation is voluntary, withdrawal from the research can be undertaken at any time without loss of benefits which the subject is otherwise entitled to.

HOW TO DEAL WITH INFORMED CONSENT IN PRACTICE?

Ensure that:

- it is understood. Explain how you check the critical part of the process;
- it excludes vulnerable persons, prisoners, mentally impaired persons, severely-injured patients, very young children, but avoid lost opportunities for these persons. The framework should guarantee their participation (notion of surrogate legal/ therapeutic representative);
- you address the fact that people rarely recall what they have agreed upon when signing an informed consent form.

PRIVACY AND DATA PROTECTION

Privacy problems exist wherever uniquely identifiable data relating to a person is collected or stored, in digital form or otherwise. Improper disclosure control can be the root cause for privacy issues.

Data affected by privacy issues

- Health Information
- Financial and Genetic information
- Criminal justice
- Location information
- Data privacy/sharing data while protecting identifiable information

How to address Data protection and Privacy?

- Describe the procedures for informed consent confidentiality.
- Inform consent for duration and limited purposes.
- Code or anonymise banked biomaterial, security for storage and handling and make sure it is lawfully processed.
- Check for accuracy, and security Check for data transferred abroad unprotected.

DUAL USE

Dual use is a term used to refer to technology which can be used for both peaceful and military aims.

DOUBLE STANDARDS

The issues at stake when conducting research in *Third Countries* are linked with applying the same criteria to other cultures. This implies that you take into account the wide disparities in health systems, the burden of disease, the level of literacy and the scientific and ethics infrastructures.

HUMAN EMBRYONIC STEM CELL RESEARCH (HESC)

Each proposal using hESC is assessed by at least two independent ethics reviews: one in the country where the research is carried out and one at the EU level. No system in the world offers a higher guarantee regarding the respect of fundamental ethics principles.

When involving the use of hESC in their research project, researchers should take into account and specify:

- if it does not destroy embryos (including to procure stem cells);
- if the consortium has taken into account the legislation, regulations, ethics rules and/or codes of conduct in place in the countries where the research using the hESC will take place, including the procedures for obtaining informed consent;
- the source of the hESC;
- the protection of personal data (genetic data and privacy);
- the nature of financial inducements, if any;
- positive opinion from a Committee constituted by Member States representatives;
- approval of the relevant national or local ethics committee prior to the start of the research activities.

ELEMENTS FOR A GOOD APPROACH

- Foresee Ethics Responsibility at the level of Work-Package Leadership.
- Include a flowchart of the Ethics review process within the partnership.
- Include an appropriate periodic report on ethics.
- Ethics consideration is reflected in the structure of the proposal.
- Include an Ethics Standing Committee or at least a periodic monitoring for ethics.
- Include a Work Package on Ethics (if relevant).
- Specifically include: Insurance of participants, Conflict of interest, Incidental findings.
- The content of the Ethics part of the proposal should reflect that the issue was thought of thoroughly.
- Address possible ethics issues, even if to justify that they are not applicable, give justification.
- Justify the choice of animals, estimate the numbers.
- Take into account data, data transfer, banks, collecting samples, future clinical trials.

RESEARCH ON ANIMALS

- Address the question of animal by explaining your choices of species.
- Make a detailed and convincing explanation for the application of the 3Rs: Reduction, Replacement, Refinement.
- Justify species and give an estimate of numbers of animals you will use.
- Refer humane end points and pain suffering.
- Check for alternatives.

FOR MORE INFORMATION

- Guide for Applicants and Ethics Review guidance: <http://cordis.europa.eu/fp7/dc/index.cfm>
- Experts' registration: <https://cordis.europa.eu/emmf7/>
- Ethics Review: http://cordis.europa.eu/fp7/ethics_en.html
- Research on Animals:

<http://www.nc3rs.org.uk/category.asp?catID=3>

http://www.vet.uu.nl/nca/links/databases_of_3r_models

Include the Ethical issues table below. If you indicate YES to any issue, please identify the pages in the proposal where this ethical issue is described. Answering 'YES' to some of these boxes does not automatically lead to an ethical review. It enables the independent experts to decide if an ethical review is required. If you are sure that none of the issues apply to your proposal, simply tick the YES box in the last row.

ETHICAL ISSUES TABLE

	YES	PAGE
Informed Consent		
Does the proposal involve children?		
Does the proposal involve patients or persons not able to give consent?		
Does the proposal involve adult healthy volunteers?		
Does the proposal involve Human Genetic Material?		
Does the proposal involve Human biological samples?		
Does the proposal involve Human data collection?		
Research on Human embryo/foetus		
Does the proposal involve Human Embryos?		
Does the proposal involve Human Foetal Tissue / Cells?		
Does the proposal involve Human Embryonic Stem Cells?		
Privacy		
Does the proposal involve processing of genetic information or personal data (e.g. health, sexual lifestyle, ethnicity, political opinion, religious or philosophical conviction)		
Does the proposal involve tracking the location or observation of people?		
Research on Animals		
Does the proposal involve research on animals?		
Are those animals transgenic small laboratory animals?		
Are those animals transgenic farm animals?		
Are those animals cloned farm animals/cloned farm animals?		
Are those animals non-human primates?		
Research Involving Developing Countries		
Use of local resources (genetic, animal, plant etc)		
Impact on a local community		
Dual Use and potential for terrorist abuse		
Research having direct military application		
I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

ENDPAGE

PEOPLE MARIE CURIE ACTIONS

Marie Curie International Outgoing Fellowships (IOF) Call: FP7-PEOPLE-IOF-2008

PART B

“PROPOSAL ACRONYM”