Marie Curie - Individual driven actions:

IEF, IIF, IOF, CIG, COFUND

Renat Bilyalov

Research Executive Agency
Marie Curie Actions – Life Long Training unit
Initial training
Initial Training Networks (ITN)

Life-long training and career development
Intra-European Fellowships (IEF) / Career Integration Grants (CIG)
Co-funding of regional, national and international programmes (COFUND)

Industry dimension
Industry-Academia Partnerships and Pathways (IAPP)

International dimension
Outgoing & Incoming International Fellowships (IIF & IOF);
International Research Staff Exchange Scheme (IRSES)

Policy support actions
Researchers’ Night; EURAXESS
The People Programme

Profile of recruited researchers

Senior Post-docs
> 10 years

Post-docs
> 4 years

Post-graduates
< 4 years

Individual researchers

Industry/Research Institutions

Research funding bodies

IEF

OI F

IIF

CIG

ITN

I APP

IRSES

COFUND
Individual Fellowships

IxF
3 types of Fellowships

**Intra-European Fellowships (IEF)**
- Within EU MS and AC

**International Incoming Fellowships (IIF)**
- From third countries into EU MS and AC

**International Outgoing Fellowships (IOF)**
- EU MS and AC residents going to Third countries including ICPC-countries
Individual driven action: Applicants are individual researchers jointly with the host organisation

For experienced researchers (only): PhD or more than 4 years of research experience;

Fellowships: are directed at life-long training and career development
Individual Fellowships Funding:

2 main areas

- Researchers salary
- includes all employers costs such as social security and pension contributions
- takes into account the cost of living in the country of recruitment
- takes into account the family obligations of the researcher

Contribution to the costs of the project

- Flat rate of €800 per researcher-month to contribute to expenses related to training activities, research costs etc
- Overheads - maximum of €700 per researcher month corrected for the cost of living in the country of recruitment
Proposals submission evolution 2007-2011

- Steady increase over the past 5 years
- Overall +15% increased compared to 2010
3032 eligible proposals were received under this call, representing 16.6% increase as compared to 2010 (3302 vs 2832)

Overall Success rate of 18,7% (600/3302) comparable to 2010 (17,8%), yet low compared to 2009 (24,1%);

In proposals retained for funding: applicants from 45 different nationalities in 21 different host countries.

<table>
<thead>
<tr>
<th>Intra-European Fellowships (IEF)</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>% increase/2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHE</td>
<td>172</td>
<td>177</td>
<td>272</td>
<td>279</td>
<td>2,57%</td>
</tr>
<tr>
<td>ECO</td>
<td>36</td>
<td>45</td>
<td>72</td>
<td>71</td>
<td>-1,39%</td>
</tr>
<tr>
<td>ENG</td>
<td>122</td>
<td>134</td>
<td>204</td>
<td>289</td>
<td>41,67%</td>
</tr>
<tr>
<td>ENV</td>
<td>286</td>
<td>248</td>
<td>309</td>
<td>388</td>
<td>25,57%</td>
</tr>
<tr>
<td>LIF</td>
<td>543</td>
<td>577</td>
<td>774</td>
<td>885</td>
<td>14,34%</td>
</tr>
<tr>
<td>MAT</td>
<td>69</td>
<td>72</td>
<td>103</td>
<td>95</td>
<td>-7,77%</td>
</tr>
<tr>
<td>PHY</td>
<td>242</td>
<td>227</td>
<td>291</td>
<td>356</td>
<td>22,34%</td>
</tr>
<tr>
<td>SOC</td>
<td>202</td>
<td>258</td>
<td>379</td>
<td>495</td>
<td>30,61%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>1672</td>
<td>1738</td>
<td>2404</td>
<td>2858</td>
<td>18,89%</td>
</tr>
</tbody>
</table>
1290 eligible proposals were received under this call, representing 11.2% increase as compared to 2010 (1290 vs 1160);

Overall Success rate increased to 15.8% (204/1290) as compared to 11.8% in 2010 (137/1160);

In proposals retained for funding: applicants from 33 different nationalities in 19 different host countries.

856 eligible proposals were received under this call, representing 17.3% increase as compared to 2010 (856 vs. 730);

Overall Success rate increased to 19.2% (164/856) as compared to 16.4% in 2010 (120/730);

In proposals retained for funding: applicants from 27 different nationalities in 22 different host countries (MS/AC) and 12 different outgoing host countries;
Budget IEF 2012 130 M€
Budget IIF 2012 45 M€
Budget IOF 2012 45 M€

Timetable 2012

Publication 13 March 2012
Closure 16 August 2012 (17:00 Brussels time)

Call indentifiers:
FP7-PEOPLE-2012-IEF/IIF/IOF

More info: guidelines, proposal submission:
Career Integration Grants

CIG
CIG - Helping Researchers to establish themselves in a long-term position

- **Researcher can be of any nationality**

- **Organisation is based in EU (MS/AC)**

- **Must have a full-time post in the host organisation**
CIG Features

- 4 years funding of €25k per year (lump sum)

- A CIG can be combined with (almost) any other funding

- CIG paid as lump sum => no restrictions on what type of project costs can be covered

- Grant can be used for consumables, technicians salary etc etc

- Simplified reporting
Marie Curie Career Integration Grants in 2012

Two deadlines:
6 March 2012, budget 25 M€
18 September 2012, budget 25 M€

Call identifier: FP7-PEOPLE-2012-CIG

CIG call page (guidelines, proposal submission):
http://ec.europa.eu/research/participants/portal/page/people?callIdentifier=FP7-PEOPLE-2012-CIG
Co-funding of Regional, National and International Programmes

COFUND
Multi-annual proposals for new or existing mobility programmes

Public or private bodies responsible for research training programmes
Main features

- 3 types of international mobility are eligible: outgoing, incoming & reintegration mobility

- EU rules: Merit-based selection of researchers, bottom-up approach, fair recruitment conditions

- Eligible researchers must be experience researchers who comply with the trans-national mobility condition

- The EU contribution is 40% of the fellowship costs, with a maximum of EUR 10 million per applicant entity for one call
Budget and timetable - COFUND

Budget 2012 110 M€

Timetable 2012

Closure 15 February 2012 (17:00 Brussels time)
- Since 1996, the Marie Curie programme has supported training for more than 60,000 researchers of 100 different nationalities working in 70 countries.

- Nearly 6,300 universities, research organisations and companies worldwide (including 5,140 in the EU) have participated in the programme since 2007.

- The countries hosting the highest number of Marie Curie researchers:
  - United Kingdom,
  - Germany,
  - France,
  - Spain,
  - the Netherlands
  - Italy.

- The total number of grant applications has increased by 65% in the past three years and the number of Marie Curie researchers is expected to hit 90,000 by the end of 2013.
Publication of FP7 calls officially switched from CORDIS to the Research Participant Portal.

FP7 calls no longer published on CORDIS. CORDIS users redirected to the relevant Participant Portal pages.
Administration and Finances

Of MCA projects
Eligible costs

1. Eligible expenses for the activities carried out by the researchers.

2. Eligible expenses for the activities carried out by the host organisations
For the activities carried out by the researchers

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Living Allowance (salary)</td>
</tr>
<tr>
<td></td>
<td>Mobility Allowance</td>
</tr>
<tr>
<td>B</td>
<td>Travel Allowance</td>
</tr>
<tr>
<td>C</td>
<td>Career Exploratory Allowance</td>
</tr>
<tr>
<td>D</td>
<td>Contribution to research and training costs</td>
</tr>
</tbody>
</table>

A-C paid to the fellow

D managed by the beneficiary for the fellow
## Overview of Cost Categories 2007-2010

<table>
<thead>
<tr>
<th>Action</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITN</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>600€ per researcher/month for lab projects and 300€ for non-lab projects</td>
</tr>
<tr>
<td>IAPP</td>
<td>YES</td>
<td>YES</td>
<td></td>
<td>NO</td>
</tr>
<tr>
<td>IEF/IOF/IIF</td>
<td>YES</td>
<td>YES</td>
<td>IOF IIF NO</td>
<td>800€ per researcher/month for lab projects and 500€ for non-lab projects</td>
</tr>
<tr>
<td>IRG/ ERG / CIG</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
</tbody>
</table>

**General rules**: For specific amounts see table correspondent WP. 2000€ per fellow. Fixed amount per researcher/month for lab projects and for non-lab projects.
For the activities carried out by the organisations

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E</td>
<td>Contribution to networking costs, costs of execution of the project</td>
</tr>
<tr>
<td>F</td>
<td>Contribution to the organisation of external events</td>
</tr>
<tr>
<td>G</td>
<td>Management</td>
</tr>
<tr>
<td>H</td>
<td>Overheads</td>
</tr>
<tr>
<td>I</td>
<td>Other</td>
</tr>
</tbody>
</table>

E-I Depends on the action and the call year
<table>
<thead>
<tr>
<th>Cost Categories</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ITN</strong></td>
<td>600€ per researcher/month</td>
<td>YES</td>
<td>7% for networks</td>
<td>10%</td>
<td>NO</td>
</tr>
<tr>
<td><strong>Since WP 2009</strong></td>
<td>1200€ per researcher/month</td>
<td></td>
<td>3% for mono beneficiary</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>IAPP</strong></td>
<td>800€ per researcher/month</td>
<td>YES</td>
<td>3%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td><strong>Since WP 2009</strong></td>
<td>1200€ per researcher/month</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>IEF, IOF &amp; IIF</strong></td>
<td>NO</td>
<td>NO</td>
<td>3%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td><strong>700€ subject to country correction coefficient per researcher/month (starting with WP 2009)</strong></td>
<td></td>
<td></td>
<td>up to 20% of total direct costs</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>IRG/ ERG / CIG</strong></td>
<td>NO</td>
<td>NO</td>
<td>Included in the Category I amount (2007)</td>
<td></td>
<td>NO (2008 onwards)</td>
</tr>
<tr>
<td><strong>General rules</strong></td>
<td>800€ or 600€ per researcher/month</td>
<td></td>
<td>7% or 3% of EC contribution</td>
<td>10% of direct costs, except subcontractors</td>
<td></td>
</tr>
</tbody>
</table>
Main changes in 2011

- Travel allowance and career exploratory allowance removed
  - Mobility allowance increased
- D & E (& F) merged
- Management costs increased

<table>
<thead>
<tr>
<th>1</th>
<th>Living Allowance (salary)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Mobility Allowance</td>
</tr>
<tr>
<td>3</td>
<td>Contribution to training expenses and research/transfer of knowledge programme expenses</td>
</tr>
<tr>
<td>4</td>
<td>Management activities</td>
</tr>
<tr>
<td>5</td>
<td>Overheads</td>
</tr>
<tr>
<td>6</td>
<td>Other</td>
</tr>
</tbody>
</table>
## Overview of Cost Categories 2011

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Monthly living allowance</strong></td>
<td><strong>Monthly mobility allowance</strong></td>
<td><strong>training/research/tok expenses</strong></td>
<td><strong>management overheads</strong></td>
<td><strong>other</strong></td>
<td></td>
</tr>
<tr>
<td><strong>ITN</strong></td>
<td>YES</td>
<td>YES</td>
<td>€1800 per fellow month</td>
<td>10% of EU contribution</td>
<td>10% of direct costs</td>
</tr>
<tr>
<td><strong>IAPP</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>IxF</strong></td>
<td>YES</td>
<td>YES</td>
<td>€800 per fellow month</td>
<td>NO</td>
<td>€700 per fellow month * country coefficient</td>
</tr>
</tbody>
</table>
Grants may take any of the following forms:

a) Reimbursement of a specific proportion of eligible costs actually incurred;

b) Flat rates: i.e. an amount to cover specific categories of expenditures pre-determined in advance
- by applying a fixed percentage (e.g. 10 % of direct eligible costs)
- by applying a scale of unit costs (e.g. 700 € per researcher/month)

c) Lump-sums: i.e. a global amount to cover certain costs necessary for carrying out an action
- overall implementation of an action
- one or more categories of eligible costs

d) A combination of the forms referred in points a), b), c).
Flat rates

- Right to get the full amount as stated in the budget of the grant agreement

- No need to submit a detailed statement of costs as actually incurred

- The payment request must include solely the amount as resulting from the application of flat rates (formulas for scale of unit costs: e.g. researcher-month)

- No ex-post reduction of the contribution when the action has been implemented in compliance with the grant agreement

Almost all cost categories
Reimbursement of eligible costs

- Right to get the amount corresponding to real costs incurred
- Need to submit a detailed statement of costs as actually incurred
- Statement in Periodic report explaining broad categories of use
- Full records of expenditures must been retained and provided upon request (audit)

Management costs

Host-driven actions: Always

Individual actions: 2007-2008 calls only (from 2009 flat rate)
Financial statement (Form C) is due within 60 after the end of the reporting period.

Reporting period depends on the project duration.

**IEF, IIF, IOF: 12-24 months** (+12 months return for IOF, IIF)

1 Reporting periods of 24 months

**IAPP, ITN, IRSES, COFUND: 48 months**

2 reporting periods of 24 months

**CIG: 24-48 months**

1 or 2 reporting periods
• For **categories A-C** we expect the **full flat rate** to be used for the fellow.

• However, in the case the fellow receives less, e.g. if allowing for a compulsory pay rise in subsequent year(s), then the actual amount used should be reported

• i.e. – be transparent
1. Proof of payment of the salary to the fellow (& of deductions for employee’s social security and tax deductions)

2. Proof of employers’ social security charge

3. Employment contract/agreement with the fellow

4. Evidence that the fellow worked on the project: this can include lab books, conference abstracts, library records, etc

5. Evidence of the eligibility of the fellow (ITN, IAPP)
• For categories D, E & 3 the full flat rate should be reported by the institution recruiting the fellow

• Transfers between beneficiaries can be addressed in the consortium agreement

• No ex-post reduction of the contribution when the action has been implemented in compliance with the grant agreement
1. For cost categories D, E & 3 the financial audit requires proof of the ‘triggering event’ – i.e. the presence of the fellow.

2. Please note:
In exceptional circumstances, where the REA had information that the host is not supporting the training and research activity of the researcher a technical audit can be performed and the flat rate can be fully or partially refused.
• For categories G & 4 (Management cost) depends on the action/call
  • ITN/IAPP – real costs
  • IxF – 2007-2008 – real costs;
  • IxF - 2010-2011 – flat rate

• Real costs: the actual costs must be reported and FULL evidence of expenditure must be retained including invoices, time sheets etc

• Flat rate: The full flat rate should be reported
• For categories H & 5 (Overheads cost) of ITN, IAPP and IxF 2007 – 2008 – a flat rate.

• Overheads are a flat rate of 10% of costs A-G and I.

• They should be reported as 10% per beneficiary per period

• Transfers between beneficiaries can be addressed in the consortium agreement
FP7 Enquiry Service
http://ec.europa.eu/research/enquiries

National Contact Points

Partner Search
http://cordis.europa.eu/partners/web/guest/home

eFP7 Help Desk
DIGIT-EFP7-SUPPORT@ec.europa.eu

EPSS Help Desk
support@epss-fp7.org

IPR Help Desk
http://www.ipr-helpdesk.org

Additional Documents and Guidance
The largest budget is foreseen for the last calls of 7th Framework programme
THANK YOU FOR YOUR ATTENTION

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http://ec.europa.eu/mariecurieactions