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

WORK PROGRAMME
Edition December 2002
2.3.1.3. - Marie Curie Host Fellowships for the Transfer of Knowledge

Specific objectives of the action

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

Implementation

This action will be implemented through:

– the reinforcement of the research potential of host entities, with priority to entities situated in Less Favoured Regions of the Member States and in the Associated Candidate Countries, in need of new areas of competence (Marie Curie Development Scheme);

– the creation and development of real strategic and durable partnerships between the academic world and the world of enterprises, in particular SMEs, aiming at the establishment of lasting collaborations of mutual interest (Marie Curie Industry-Academia Strategic Partnership Scheme).

Marie Curie Development Scheme

Project and participants

This action aims to support projects presented by a legal entity in need of developing new knowledge, with priority to those situated either in less favoured regions of the Member States or in the Associated Candidate Countries, in order to:

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

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

Community financing

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

This action is addressed to experienced researchers. The relative proportion of researchers in either direction should be balanced with respect to the objective described in the proposal (typically no more than 50% of the person-months should be used for outgoing experienced staff members).

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

In the context of this action, staff members to be eligible must have been active in the same organisation continuously for at least the last three years. Staff members of the host sent out to gain or transfer knowledge must return to their organisation of origin after the mobility period to transfer the knowledge home.

(from 2.5.3)

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

For host-driven actions, the reference deadline for eligibility is the selection of the eligible researcher by the host organisation in the framework of this action. For individual-driven actions, researchers must comply with this rule at the latest eight months after the relevant deadline for submission of proposals. In all cases, the researcher must have met all the necessary requirements for the conferment of the doctoral degree, as officially certified by the awarding body.

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

Less favoured regions

For the definitions see www.cordis.lu/improving/fellowships/lessfavouredregions.htm

Common conditions of both schemes

Project and participants

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

For this purpose, the proposal should contain an overall plan that demonstrates the needs for new knowledge and the strategy of transferring and exploiting the acquired knowledge.
The maximum duration of a project will normally be four years from the date of commencement given in the contract.

**Indicative scope of activity**

For each 100 M €, this action should allow:

- conclusion of 200 contracts, involving 350 host organisations
- provision of funding for approximately 1400 person-years

As an indication, the size of the projects will vary between 100 000€ and 1 000 000€. The Community financing will be able to cover up to 4 years.

As an objective, 66% of the total funding possibilities for this action will be for the *Marie Curie Development Scheme* and 34 % for the *Marie Curie Industry-Academia Strategic Partnership Scheme*; a minimum of 70% of the budget of the *Marie Curie Development Scheme* should be directed towards projects transferring knowledge to Community Less-Favoured Regions and Associated Candidate Countries, and at least 30% of the budget of the *Marie Curie Industry-Academia Strategic Partnership Scheme* should be directed towards the participation of SMEs in this action.
2.6. Planning of activities and budgetary aspects

<table>
<thead>
<tr>
<th>Actions</th>
<th>Indicative Amounts for the calls closed in 2003</th>
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<tbody>
<tr>
<td>Marie Curie Host Fellowships for the Transfer of Knowledge</td>
<td>40</td>
<td>45</td>
</tr>
</tbody>
</table>

1 These amounts comprise the total indicative amounts for the calls including contributions from Associated States. Other expenses such as evaluation costs and administration costs are not included.

2 Indicative amounts foreseen in the closed calls or the intermediate closing of open calls which have been or will be open in the year of reference. This does not signify that these amounts will be engaged in the year of reference.

3 Indicative amounts foreseen in the closed calls or the intermediate closing of open calls which have been or will be open in the year of reference. This does not signify that these amounts will be engaged in the year of reference. These amounts can be reviewed in the frame of the periodical revision of the work programme and on the basis of budgetary availabilities for 2004.
Call Information for Marie Curie Host Fellowships for the Transfer of Knowledge for 2003 and 2004

1. Specific Programme: “Structuring the European Research Area”
2. Activity: Human resources and mobility activities
3. Call title: Call for proposals for Marie Curie Host Fellowships for the Transfer of Knowledge
5. Date of publication5: 17 December 2002.
6. Closure date(s)6: 22 May 2003, 19 May 2004 both at 17.00 (Brussels local time)
7. Total indicative budget: 40 M€ for May 2003 – 45 M€ for May 2004
8. Instruments: see section 2.3.1.3 of the work programme
9. Minimum number of participants: see the conditions specified in sections 2.3.1.3 of the work programme
10. Restrictions to participation (types of organisation, type of activity, third countries): see the conditions foreseen in the sections 2.3.1.3 and 2.5 of the work programme
11. Consortia agreements: Participants in RTD actions resulting from this call are not required to conclude a consortium agreement.
12. Evaluation procedure: The evaluation shall follow a single stage submission; and Proposals will not be evaluated anonymously.
13. Evaluation criteria: See Annex Mob-B of the work programme for the applicable criteria (including their individual weights and thresholds and the overall threshold) per instrument.
14. Indicative evaluation and contractual timetable:
   • Provisional evaluation results: estimated to be available within some 4 months after the closure date
   • Contract signature: it is estimated that the first contracts related to this call will come into force before the end of 2003.

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4 The call identifier shall be given in the published version of this call.
5 The director-general responsible for the publication of this call may publish it up to one-month prior or after its envisaged publication date.
6 When the envisaged publication date is advanced or delayed (see previous footnote), closure date(s) will be adjusted accordingly.
### II. General Annexes to Human Resources and Mobility

#### Mob-A. Road Map of Calls for Proposals

<table>
<thead>
<tr>
<th>Type of actions covered by the call</th>
<th>Publication of call for proposals</th>
<th>Dead-line for reception of proposals</th>
<th>Estimated dates for conclusion of first and last contracts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer of Knowledge fellowships</td>
<td>Dec 02</td>
<td>22 May 03</td>
<td>October 03 - December 03</td>
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<td></td>
<td></td>
<td>19 May 04</td>
<td>October 04 - December 04</td>
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