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COMMISSION STAFF WORKING DOCUMENT

Mobility of Researchers and Career Development Implementation Report 2007

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COMMISSION STAFF WORKING DOCUMENT

Mobility of Researchers and Career Development Implementation Report 2007

1. EXECUTIVE SUMMARY

1.1 Introduction

2007 was a particularly important and stimulating year for mobility and career development for researchers in the European Research Area (ERA). It was driven by the second cycle of the Lisbon Strategy for Growth and Jobs¹ and by public and political discussions on a re-launch of the ERA following a Commission Green Paper². This created new momentum for the ERA, recognising the importance of its role in bringing about the European knowledge-based economy. As part of five major new initiatives to advance the ERA, the Commission has in the meantime proposed³ a partnership with Member States to accelerate and focus work at national and European level on key outstanding issues pertaining to researchers' mobility and careers.

This sixth annual report, however, reflects in the first instance national progress in 2007, based largely on objectives set out in earlier Commission Communications⁴ and their endorsement by Council Resolutions⁵. This report is part of the regular reporting process on the mobility of researchers and career development, requested by the Council.

In addition to activities under the Framework Programme for Research and Technological Development, in particular the "People" Programme, a considerable part of the work is pursued with the help of the dedicated Steering Group on Human Resources and Mobility (SGHRM)⁶. In line with the Open Method of Coordination in research, the SGHRM regroups

¹ Communication from the Commission to the European Council: "Strategic report on the renewed Lisbon Strategy for Growth and jobs: launching the new cycle (2008-2010) Keeping up pace for change" COM (2007) 803 final of 11.12.2007.

² Green Paper "The European Research Area: New Perspectives" COM (2007) 161 final of 4.4. 2007.

³ "Better careers and more mobility: a European Partnership for researchers" adopted on 23 May 2008 COM (2008) 317 final; SEC (2008) 1911; SEC (2008) 1912.

⁴ - "A mobility strategy for the European Research Area" COM (2001) 331 final of 20.06.2001
- "Researchers in the European Research Area: one profession, multiple careers" COM (2003) 436 final of 18.07.2003

- "3% Action Plan" COM (2003) 226 final of 30.04.2003.

⁵ - Council Resolution "concerning the reinforcement of the mobility strategy within the European Research Area (ERA)" 2001/C 367/01 of 21.12.2001

- Council Resolution "on the profession and career of researchers within the European Research Area (ERA)" 2003/C 282/01 of 10.11.2003.

⁶ To step up mutual learning, the Steering Group Human Resources and Mobility held on 19 June 2008 a workshop which focused on 1) the role and tasks of the SG HRM members, 2) the services provided by the EURAXESS Services Network (former ERA-MORE Network) and the EURAXESS Jobs Portal (former European Researchers' Mobility Portal). It focused discussions on experiences in different countries (see conclusions of the workshop at http://circa.europa.eu/Members/irc/rtd/paneurrmp/library?!=euraxess_19062008&vm=detailed&sb=Title). New mutual learning workshops will be organised to help identify good practices on specific issues and facilitate cooperation between countries, with a view to deciding on priority action.

representatives of 36 countries⁷, including since 2007 Serbia and the Former Yugoslav Republic of Macedonia — FYR Macedonia — in view of their association to the Framework Programme.

The members⁸ of the SGHRM provided written input on national activities. However, the nature of the feedback does not allow a fully fledged monitoring nor a proper assessment.

They also helped collect and verify data on EU action.

The overall impression deriving from this collection of information is that, while a number of initiatives were taken and progress was made at European and national level to promote researchers' mobility and career prospects, these efforts remain too weak, dispersed, and piecemeal to be really effective.

This observation stresses the need for a more structured approach, both in terms of formulating a strategy and of following it up, as defined in the Communication "Better careers and more mobility: a European Partnership for researchers" adopted in May 2008⁹.

1.2 Highlights for 2007

Overview

- The fine-tuning of the European Researchers' Mobility Portal¹⁰ continued with improvements being made to some of the main features, including the job vacancy data-base tool, integration of FP7 Calls, links to JRC Institutes. Contacts with job providers were strengthened. As a result, there was a steady increase in the number of research organisations making use of this service. The number of posted *curricula vitae* also increased, as did the number of web page views, with an average of 320 000 per month (272 000 in 2006), whilst the monthly average of visitors was close to 38 000.
- The ERA-MORE Network, launched in 2004, comprises 200 Mobility Centres in 35 countries. It was extended in 2007 to new countries, viz. Croatia, FYR Macedonia and Serbia. With the Mobility Centres up and running, other activities, such as staff training, networking at national level, and updating of the national portals, took a more prominent place. An evaluation of communication and information activities relating to ERA-MORE and the Mobility Portal confirmed the importance of the Network among the research community, but also revealed the need for further awareness activities. After the initial EC funding for both initiatives, national authorities had to finance any further development. In several cases this did not happen, or only provisional or partial financing was provided, while in others, the

⁷ Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Former Yugoslav Republic of Macedonia, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italia, Latvia, Lithuania, Liechtenstein, Luxembourg, Malta, Norway, Poland, Portugal, Romania, Serbia, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, The Netherlands, Turkey, United Kingdom.

⁸ Not all participating countries have provided information.

⁹ COM (2008) 317 final; SEC (2008) 1911; SEC (2008) 1912.

¹⁰ Since 24 June 2008, the activities referred to as 'European Researchers' Mobility Portal', 'ERA-MORE Network', 'European Charter and Code' and 'ERA-Link' are overarched by a unique and common logo, thus becoming, respectively, EURAXESS Jobs, EURAXESS Services, EURAXESS Rights and EURAXESS Links.

funding came to an end. Considering the benefits of the initiative¹¹ to researchers, the attention of national authorities is drawn to the importance of maintaining and developing both national ERA-MORE networks and Portals.

- As regards awareness-raising activities, more than 150 towns from 28 countries were involved in the Researchers' Night 2007, and more than 250 000 people attended the events (compared with 100 towns from 22 countries involving 100 000 people in 2006). Several million more people were made aware of the various events, and of how attractive a job research is, via television, radio, newspapers and internet.
- There were new developments in 2007 concerning the Recommendation on the European Charter for Researchers and the Code of Conduct for their Recruitment (C&C). The Commission received 23 new declarations, representing 113 additional organisations. As a result, at the end of 2007, the total of received declarations reached 90, representing 867 organisations spread over 24 countries¹². Despite these positive results, progress on implementation remained uneven. Work on setting up a Charter & Code (C&C) implementation mechanism therefore continued in an ad hoc "Charter and Code label expert group".
- At the end of 2007 only one third of EU countries¹³ had officially finalised the transposition of the "scientific visa" directive¹⁴ aimed at facilitating administrative procedures for third-country researchers entering the European Community, while the process was ongoing in a number of others¹⁵. The Recommendation on easing short-term visa procedures did not have a significant impact on national procedures¹⁶.
- Concerning the ERA-Link initiative (<http://cordis.europa.eu/eralink>) — officially launched in the USA in June 2006 by Commissioner Potočnik — considerable progress was made during the year, enabling the project to enter a new phase of consolidation and expansion, with membership in the USA reaching 3 000 and growing steadily. The developments for the USA in 2007 included a renewed outreach campaign to consolidate the network and expand its membership; upgrading the website to provide more information, new services and networking features; circulating a periodic newsletter; organising meetings and events across the USA, and more structured participation in career fairs.

¹¹ In 2007 33 Bridgehead Organisations and 95 Mobility Centres provided tailor-made assistance to almost 40 000 researchers and/or their families, and replied to 75 000 questions.

¹² It is important to differentiate between the number of declarations and the number of organisations they represent. For example, a Rectors' Conference sends one declaration, but may represent a certain number of member institutions.

¹³ 10: BE-DE-IE-ET-HU-NL-AT-PL-PT-SK — and NO as concerns the short-term visa (< 3 months) -.

¹⁴ Council Directive 2005/71/EC of 12 October 2005 on a specific procedure for admitting third-country nationals for the purposes of scientific research ("Scientific visa") OJ L 289/15 of 3.11.2005.

¹⁵ By October 2008, 21 countries out of 25 concerned had notified measures which they identified as fully transposing the directive.

¹⁶ Recommendation of the European Parliament and of the Council of 28 September 2005 "to facilitate the issue by the Member States of uniform short-stay visas for researchers from third countries travelling within the Community for the purpose of carrying out scientific research" (2005/761/EC)

Following contacts in 2008 between DG Research and DG Justice, Freedom and Security (JLS), plans have been made to collect data with a view to further developments on this topic.

- Under the Marie Curie Actions, more than 2100 researchers were recruited and seconded as a result of contracts negotiated in 2007 concerning the Initial Training Networks (ITN) and the Industry-Academia Partnerships and Pathways (IAPP). 632 research organisations were supported by the ITN and 152 by the IAPP schemes to provide a platform for training researchers recruited as part of a defined collaborative project. In addition, a new scheme, Co-funding of Regional, National and International Programmes (COFUND) was launched at the end of 2007 to support new or existing fellowships programmes to boost trans-national mobility for training and career development of experienced researchers. Another new scheme, International Research Staff Exchange Scheme (IRSES) sought to strengthen research partnerships through short exchanges between European research organisations and organisations from countries with which the European Community has a science and technology agreement (or is in the process of concluding one) and countries covered by the European Neighbourhood policy.

Selection of typical national achievements

A number of specific national initiatives also merit highlighting. For the Researchers' Mobility Portal in Bulgaria, for instance, the web sites of the Regional Mobility Centres were assessed by an expert group on the basis of a questionnaire devised by the ERA-MORE Quality Working Group, and were subsequently re-designed. In Germany, a “returning” researchers’ section has been added, designed especially for German and European researchers planning to come back to Germany or other parts of Europe from abroad. In Turkey, there was also a successful drive to promote the publication by industry of jobs offered via the Portal.

- Complementing the information and assistance activities of the Mobility Centres, a number of other events were organised within the ERA-MORE Network, for instance on legal, social security and taxation aspects in Austria and the Czech Republic; on the recognition of qualifications and best practices at institutional level concerning researchers’ mobility in Italy; on the C&C and the ERA Green Paper in Sweden. These local, regional, national or international events involved representatives of the ERA-MORE networks, universities, research organisations, public institutes, industry, and were aimed at exchanging information and experience, or were used for training purposes.
- Member States were particularly active in raising awareness. Besides the Researchers' Night, which took place in 28 countries, there were a wide range of other initiatives. The type of events organised in the Czech Republic give a good idea of the range: “Science and Technology week” — lectures, workshops, exhibitions, visits to laboratories; “Open science initiative” — internships for students in scientific institutes; “Don’t be afraid of Science” programme — set of lectures for high school students; “Science in the Street” project — Ecomobile, crash tests etc; Workshop “Science and the media, effective communication”.
- In addition, there were a number of developments at national level concerning the C&C: promotional events (in particular in Belgium, Norway, Slovenia); new signatories (particularly in Austria, Bulgaria); adaptation of national legislation to take account of the C&C (Ireland, Luxemburg, France, Spain); gap analysis (Norway); initiatives to structure C&C implementation (Switzerland).

- Efforts were also made to encourage intersectoral mobility, e.g. in France new opportunities for universities to recruit researchers and teacher/researchers for short periods; in Lithuania the “Concept for the Establishment and Development of integrated Sciences, Studies and Business Centres (Valleys)”, or in Slovenia the “Young Researchers for Industry” project .

2. A MORE TRANSPARENT LABOUR MARKET

2.1. The European Researchers’ Mobility Portal

The Portal, <http://ec.europa.eu/eracareers>¹⁷, was launched in 2003 to improve access to information on fellowships, grants and vacancies throughout Europe, and covering the entry conditions, access to employment, social security rights, taxation and the cultural aspects of a host country. As a shared initiative between the Commission and the participating countries, the European portal is complemented by a number of national mobility portals.¹⁸

2.1.1. At European level

The Commission continued to emphasise the need for a higher degree of interoperability with national portals.

After a revamp in 2006, some of the main features (e.g. job vacancy data-base tool, integration of FP7 Calls, links to JRC Institutes, etc) were further improved in 2007. Contacts with job providers were built up to boost job opportunities for researchers. As a result, there was a marked increase in the number of research organisations making use of this service. The number of posted *curricula vitae* — an option offered to researchers — also increased significantly, as did the number of page views, with an average of some 320 000 per month, whilst the monthly average of individual visitors was close to 38 000. To promote all the activities related to the portal and other career and mobility-related initiatives, the Commission continues to issue an electronic Newsletter *Europe4Researchers*¹⁹.

2.1.2. At national level

In 2007, 31 national portals were fully operational and integrated into the European portal²⁰. The full development of the national portals/web sources is essential if the *Mobility Strategy* is to work properly at both national and European level. Nearly half of them use technical resources provided by the Commission to display jobs related to their country and published on the European portal, but there is still room for improvement and for greater interoperability between national portals and the European one.

Bulgaria: In 2007, the National Research Mobility web portal <http://www.eracareers-bg.net> was enhanced: a researchers’ jobs database in Bulgarian was added; the Portal information was translated into Bulgarian, and an information section for the FP7 People

¹⁷ Since 24 June 2008 the new URL is: <http://ec.europa.eu/euraxess/jobs>.

¹⁸ Thirty-one national Researchers’ Mobility Portals are already available: AT, BE, BG, CY, CZ, DK, EE, ES, FI, FR, DE, EL, HU, IS, IE, IL, IT, LT, LV, MT, NL, NO, PL, PT, SK, SI, ES, SE, CH, TR, UK. Four more are in the pipeline: LUX, HR, YU, and FYR Macedonia
http://ec.europa.eu/euraxess/index_en.cfm.

¹⁹ <http://ec.europa.eu/euraxess/newsletter>.

²⁰ http://ec.europa.eu/euraxess/index_en.cfm.

Programme was created.

In addition, the Regional Mobility Centre (RMC) web sites were improved: an expert group of 9 members assessed them on the basis of a questionnaire devised by the ERA MORE Quality Working Group. The recommendations were sent to all mobility centres for implementation. An example of the final design of the regional RMC web sites can be viewed at Sofia — <http://www.unwe.acad.bg/mobility/> or Rouse — <http://cicm.ru.acad.bg>.

Czech Republic: The Researchers' Mobility Portal of the Czech Republic underwent major improvements. In particular, a new link "Job vacancies" (www.jobs.cz) was established within the portal (in English) to facilitate the needs of foreign researchers, providing information about the position-openings for researchers in the Czech Republic (see <http://www.eracareers.cz/>)

A new reference within the mobility portal was also made to the website of the Czech Research and Development Council, where all relevant information about Czech R&D is gathered (www.vyzkum.cz). The website has also an English version.

Estonia: The Estonian Researchers' Mobility Portal www.smartEstonia.ee was updated throughout the year, and preparations began for a face-lift. The idea of ensuring sustainability, by combining mobility information for incoming researchers and students into a single portal and thus pooling resources, proved to be viable.

Germany: The German Mobility Centre at the Alexander von Humboldt Foundation maintains an Internet portal with information on fellowships and funding programmes, social security and taxes as well as many practical matters. Until recently, it was geared to "incoming" and "outgoing" researchers. A "returning" researchers section was added, designed expressly for German and European researchers planning to come back to Germany or elsewhere in Europe from abroad (www.eracareers-germany.de).

Iceland: During 2007 the Icelandic Mobility Portal (<http://www.eracareers.is>) was redesigned and the information updated. Changes were made to make it more user friendly and more consistent with the European Mobility Portal. The Icelandic Portal will continue, and work is being done to define and organise the future operation.

Ireland: The further development of the Research Job Opportunities function available on the national portal, ensuring wide dissemination, was a key priority in 2007. Industry partners and research active organisations were encouraged to use the facility as a means of searching for applicants and advertising their profiles on a large database of registered users, both in Ireland and worldwide. There were almost 2500 users registered on the portal, and the number is increasing.

Italy: In 2007, the Portal hosted the questionnaire of the Italian Network of Mobility Centres, aimed at investigating obstacles and issues that foreign researchers face during their stay in Italy. The Guide for Foreign Researchers, also developed at national level and published by the (CRUI) Conference of Italian University Rectors' Foundation, a bridgehead organisation for ERA-MORE in Italy, was also published online in the National Portal, to make it available to a wider audience.

The Netherlands: Following the cessation of EC funding in 2007, the Ministry of

Education, Culture and Science asked the three bridgeheads to extend the project into the next phase and to come up with a new project plan. This plan, which should be implemented by 2010, seeks to improve the organisation and the visibility of ERA-MORE NL as well as the services provided, while enlarging its independence and financial sustainability after three years.

Norway: The Norwegian Ministry of Education and Research decided that the Research Council of Norway (RCN) should continue the National Portal after the end of the ERA-MORE project on 30 November 2007.

Poland: The Polish Researchers' Mobility Portal <http://www.eracareers-poland.gov.pl/> was updated on a regular basis throughout 2007, with the main focus on legal aspects connected to mobility.

Slovakia: In November 2007, the mobility centre in SAIA, n.o. (Slovak Academic Information Agency) signed a new short-term contract with the Ministry of Education. The funding was scheduled to run up to the end of March 2008, thus enabling SAIA, n. o. to finish the migration of the national Researchers' Mobility Portal, revamp it, produce updates of its guides for incoming and outgoing researchers, and prepare some material for promoting Slovak R&D abroad and ERA-MORE in Slovakia. During the reporting period the national Mobility Portal received 110 690 visitors, reporting 728 616 hits and 176 813 viewed pages.

Slovenia: The portal gained a lot of visibility in 2007, through the awareness raising activities organised by the host institution CMEPIUS (Centre for Mobility and Educational and Training Programmes) and the promotional material (guides for researchers and for partner public administration institutions, newsletter "Priložnosti" ("Opportunities")). Since the financial assistance from the Noordung Project for national activities was due to expire by the end of the year, the Ministry decided to provide special financial support to maintain the portal for the following year.

Spain: In June 2007, a new agreement was signed between the Secretary General for Scientific and Technological Policy of the Ministry of Education and Science and the Spanish Foundation for the Science and Technology to finance the management and the continuity of the Spanish Network of Mobility Centres and Spanish participation in the European Network. This agreement finances in particular such tasks as coordination and economic support for the Mobility Centre (MoC), launching of Mobility Centres in Navarra and Castilla-León, keeping the practical guide for foreign researchers and the mobility portal up-to-date, coordinating Spanish participation in EC initiatives, and training the people responsible for the Centres.

Sweden: The Governmental Agency (Vinnova) maintains the Researchers' Mobility Portal (www.researchinsweden.se). During autumn 2007 the average number of one-off visitors to the portal was 30 per day. A Helpdesk service was maintained by Vinnova, targeted at researchers interested in doing research work in Sweden.

Switzerland: In April 2007 it was decided to transfer the Swiss Mobility Portal (www.eracareers.ch) from the State Secretariat for Education and Research (SER) to the Rectors' Conference of the Swiss Universities (CRUS). CRUS was acting as ERA-MORE Bridgehead Organisation for Switzerland and was mandated by the SER to coordinate the FP7 project "Swiss Network of Mobility Centres" as part of the enlargement of the

European ERA-MORE network.

UK: The most popular items visited on the UK portal concerned visas, tax, healthcare, jobs and location of mobility centres. The top ten countries of origin of visitors (excluding the UK), were the USA, France, Australia, Italy, Poland, Germany, Spain, Portugal, the Netherlands and Brazil. The eracareers address is a proxy for the portal, located at www.britishcouncil.org/eumobility.

2.1.3. Prospects

There is a constant need to monitor the quality of the information at both European and national level.

The Commission will continue to seek structured feedback from the research community on the quality, added value and necessary technical adjustments of the mobility portal.

Future developments include extending the international dimension (with reference to the “Scientific diasporas”).

2.2. ERA-MORE: the European network of Mobility Centres

2.2.1. Activities at European level

The ERA-MORE network comprises 35 countries with some 200 Mobility Centres, complemented by numerous local contact points. The objective is to provide tailor-made assistance to researchers and their families before and during a mobility period in a European country. Besides their operational task of helping researchers and their families in all mobility-related matters, the Centres are being more and more recognised as having expertise and knowledge in dealing with obstacles to the mobility of researchers.

The national work programmes co-funded by the Commission and the Member States continued to be implemented: by the end of 2007 some 70% of the contracts had reached the final project stage. The remaining 30% were due to continue until mid 2008. There was a call for proposals for members of the network on “Transnational collaboration among ERA-MORE members”. Of the 10 projects received, five passed the evaluation session thresholds.

Once the Mobility Centres had been set up, other activities, such as staff training, networking at national level, updating of the national portals, preparing guides for researchers, promoting activities and cooperating with policy stakeholders, took a more prominent place. Equally, evaluation of user feedback is becoming more and more important, in particular with a view to securing sustainable resources for ERA-MORE after the initial EC funding ends.

The challenge of ensuring the sustainability of the Mobility Centres’ network after the three-year EC start-up funding required heightened national efforts in addition to the provision by the Commission of substantial resources for networking activities at European level.

After a pilot phase in 2006, the first full data collection on the activities of the network took place in 2007. It transpired that the first and most important access points were the national portals, with the number of hits on the increase (some 6 million page views in 2007). In 2007, 33 Bridgehead organisations and 95 service centres provided tailor-made assistance to almost 40 000 researchers and/or their families and replied to 75000 questions. Most of the questions

related to “accommodation”, followed by “funding opportunities” and “entry conditions”. The data collection exercise will be continued.

In 2007, there was an assessment of the level of awareness among the research community of the ERA-MORE Network and the European Researchers’ Mobility Portal. The study confirmed the importance beneficiaries attach to the network, but revealed also the low awareness of the research community.

As a follow-up to the main recommendations of the study, a contract was signed to re-brand ERA-MORE, the European Researchers’ Mobility Portal and the C&C, and to create a single brand overarching them. A fourth initiative was added to the re-branding exercise: ERA-link (the European Researchers Abroad link).

A series of networking activities were organised by the Commission to boost cooperation between ERA-MORE staff and improve the overall performance of the network. The challenge for these European networking activities was to bring the national activities together and to add a European dimension to form a coherent and operational European network. The most important event for the network was the ERA-MORE Conference in Sitges, Spain (19-21 March 2007), with some 250 participants from all ERA-MORE member countries.

The Commission organised two meetings in 2007 of the bridgehead organisations, with a view to discussing strategic issues.

ERA-MORE seeks to ensure that a researcher receives the same quality of information in all Mobility Centres in each country. To this end, the quality working group, created in 2005, pursued its efforts towards achieving consistency throughout Europe. The group met four times in Brussels to discuss a new Declaration of Commitment, quality indicators for the network and a quality approach for the national portals. It also prepared the data collection exercise and put forward standard questions for qualitative evaluation.

To get the new visual identity across, a Working Group on Promotion was established. Despite efforts at national and European level, ERA-MORE can still improve its visibility, e.g. by awareness raising and on promotional material (which will be made available to the members of the network).

The internal communication platform, the ERA-MORE *extranet*, dating from April 2006, was improved by adding important features such as links for the structured training session. It provides for a member database, thematic sections for the exchange of material, an event management facility, a discussion forum and a tool for collecting statistics. The extranet is used more and more by ERA-MORE staff and is seen as a useful instrument for interaction with other members.

The first training session on evaluation issues was a great success, meeting the need for more theoretical and practical knowledge on evaluation issues. A second session was organised, enabling members of the ERA-MORE network to be trained on evaluation issues to improve the way Mobility Centres operate.

2.2.2. At national level

<p>Austria: The Consortium of the Austrian ERA-MORE network met twice to discuss the</p>

issues brought up at the Bridgehead Meetings in Brussels and to plan ongoing activities, to generate new ideas and to coordinate events and awareness raising activities. The Local Service Centres held an information event "Update 2007" on legal, social security and tax issues. The Austrian ERA-MORE newsletters contained information for the Mobility Centres and Local Service Centres and to keep network members up to date about progress in supporting mobile researchers.

Czech Republic: During 2007 the Czech Mobility Centre (CMC) <http://www.avcr.cz/ccm.php> worked with the Regional Cooperating Points (RCPs) on further awareness-raising campaigns and on broadening the range of partner organisations. The CMC organised several seminars and consultations for representatives of the RCPs, representatives of universities, research organisations, public institutes, industry and all other stakeholders involved in assisting foreign researchers during their stay in the Czech Republic. The seminars covered such topics as health insurance and social security for foreign researchers working in the Czech Republic; tax issues (in cooperation with Ernst&Young Tax&Transactions, Ltd.); consultation with experts in the field of Czech social security administration.

In total 1424 enquiries were made to the CMC and regional branches in 2007. The most frequent requests were for help with contacts, taxes and salaries, job opportunities, accommodation and cultural events in regions.

Germany: The German Mobility Centre at the Alexander von Humboldt Foundation, an active player in the ERA-MORE network, also acts as help desk for researchers. Every month on average, the Mobility Centre answered 700 to 800 enquiries from incoming, outgoing and returning researchers on such topics as fellowship programmes, taxes and social security. The Humboldt Foundation maintains a network of persons at universities in Germany who counsel internationally mobile researchers and provide regular training on current topics, such as the new scientific visa package.

Greece: When the 2003 contract with the European Commission expired in June 2007, all members of the network but one wanted to remain in ERA-MORE and thus signed the Declaration of Commitment as requested by the Commission. This shows the high degree of cohesion among the members of the network and the commitment of the respective institutions to continue to support (in human resources and expenditure) this facility. The national Mobility Centres network also participated in all ERA-MORE networking activities, such as the Conference in Sitges and the three Working Groups (conference preparation, quality, promotion). It also took part in several training sessions and events, and provided statistics.

Ireland: The mobility office continued to function with financial commitment from the Department of Enterprise, Trade and Employment, and the Irish Universities Association (IUA) was also committed to providing some funding to ensure the sustainability of ERA-MORE Ireland.

With the large-scale dissemination and promotion of ERA-MORE Ireland, help desk activities and queries via telephone and e-mail grew rapidly in 2007. The majority of queries addressed third country visa requirements and ranged from entry visas for researchers, partners and/or family visas, short term visas to renewal and change in status of visas. The implementation of the hosting agreement led to large-scale provision of

assistance and advice to researchers, research agencies and higher education departments.

Italy: The Conference of Italian University Rectors (CRUI) Foundation, the Bridgehead organisation for ERA-MORE in Italy, organised a national event on 9 March 2007, focused on tools (recognition of qualifications, social security) and best practices at institutional level concerning researcher mobility (contracts, mobility strategies, services, programmes). Promotional material (flyers, posters, Guide for Foreign Researchers) was prepared and distributed by the Bridgehead organisation, at national and international level, including 1000 printed copies of the *Guide for foreign researchers* disseminated for instance to the National Network of Mobility Centres, to the Universities and Research Centres and to the Presidents and General Secretaries of some 30 Rectors' Conferences attending the European Universities Association (EUA) Council meeting (28 March 2007).

Norway: The initial EU financial support to the ERA-MORE project in Norway ended on 30 November 2007. The Norwegian Ministry of Education and Research thereupon decided that the coordination of the national network of centres providing information and assistance to mobile researchers was to be continued by the Research Council of Norway (RCN), which accepted the proposal.

Slovakia: In 2007 two mobility centres were operating in Slovakia: SAIA, n. o. (Slovak Academic Information Agency) and the Technical University of Košice. The European Commission's 3-year funding of both centres finished at the end of February 2007. The mobility centres were able to carry out their basic functions in 2007, relying on in-kind support from other programmes, sharing staff and resources. The national Researchers' Mobility Portal was transferred from the Technical University of Košice to SAIA, n. o., which is also running other portals dealing with mobility (www.saia.sk, www.scholarships.sk).

SAIA, n. o. also submitted, together with eight mobility centres from eight countries, a three-year project E*CARE within the PEOPLE Call for transnational collaboration among ERA-MORE members. The overall goal of the project is to strengthen the services of ERA-MORE members in support of researcher mobility, and to enhance collaboration among Mobility Centres on the basis of shared experience, practices and tools.

Slovenia: The national ERA-MORE network became operational in 2007, and this had a strong impact on the visibility of ERA-MORE activities. Several awareness raising events, mainly of regional or even international character, were organised by partner institutions in the network (a regional round table by the University of Primorska, an international-multicultural seminar by the University of Maribor and a trans-national mobility seminar by the University of Ljubljana). For the network programme development a Steering Group was set up, bringing in the Ministry of Economy, Ministry of Labour, Family and Social Affairs, the Slovenian Science Foundation, the Chamber of Commerce and the Slovenian Association of Young Researchers.

Sweden: Mobility Centre Sweden (MCS) activities were financed by the European Commission 3-year project that finished in September 2007. During the autumn 2007, discussions were held with three other research agencies in Sweden to find a long term solution for MCS activities.

The Bridgehead Mobility Centre Sweden at Vinnova established a network of Contact Points consisting of individuals (some 40 persons) mainly working at universities and university colleges. During 2007 this Contact Point network held two meetings, in March

and September. Subjects included the “Charter and the Code” and the “ERA Green Paper”. An important part of the meetings was to exchange information amongst the participants and involve key persons (from e.g. ministries and authorities) in the researcher mobility field.

Switzerland: In August 2007 Switzerland — represented by the Rectors’ Conference of the Swiss Universities CRUS — submitted the proposal “Swiss Network of Mobility Centres” (SNMC) as part of the People-Work Programme 2007 (FP7-Adhoc-2007-13), a measure for enlarging the European ERA-MORE network. The EU funding will strengthen the Swiss network of Mobility Centres and help develop the Swiss mobility portal in accordance with European standards. In addition, cooperation between the Equal Opportunities Officers and the young researchers associations at the Swiss HEI and the mobility centres was strengthened.

Turkey: The Turkish Researchers’ Mobility Portal (www.fp7.org.tr/eracareers) was redesigned following feedback from Mobility Centres and researchers. RSS (Really Simple Syndication) was installed on the web site, allowing Turkish job offers to be displayed on the European Researchers Mobility Portal, and as announced through the Mobility Centres Network. The biggest IT Company in Turkey published its job offers through the ERA-MORE network via the RMP, and this was promoted as a success story. The portal will be renewed with the change in the structure of the FP7 National Website.

2.2.3. Prospects

The most challenging task was to sustain the work of the Mobility Centres after the initial EC start-up funding stopped and to maintain ERA-MORE as a permanent structure. This requires balanced investment both at national and European level. While the Commission continues to put substantial resources into networking activities at European level, e.g. structured training sessions, working group, the Member States are required at national level to develop models for sustainable development.

Five new ERA-MORE contracts, concluded in 2008 with Croatia, FYR Macedonia, Luxembourg, Serbia and Switzerland, will now be implemented.

The “*EURAXESS — Researchers in Motion Activities*” initiative — covering the former ERA-MORE Network, the European Researchers’ Mobility Portal, the implementation of the C&C, and the ERA-Link and NERE-Link (officially launched in June 2008) — should be carefully monitored.

2.3. Awareness-raising activities

2.3.1. At EU level

Awareness-raising activities in 2007 focused on the “Researchers’ Night”, which took place on 28 September 2007, following on from the successful call for proposals for 2006, which covered 22 countries and led to the co-financing of 30 projects in both Member and Associated States.

67 proposals were received, from which 40 were awarded funding, representing €3 039 000. More than 150 towns from 28 countries were involved, and more than 250 000 people attended the events. Millions of people were made aware about the events — and about the

researchers' job and its importance — through broadly conceived campaigns involving television, radio, newspapers and internet.

To enhance the European dimension of the initiatives, European stands with promotional material and information, and showing a short information film, were included in all the projects from the very start.

The various types of activities and the focus on researchers and the importance of their role for society were treated in a consistent way. All projects feature an assessment, notably regarding the image of researchers, and all of them underlined the satisfaction of both organisers and the participating researchers, as well as the enthusiasm of the attendants and their expectations for future such initiatives.

2.3.2. At national level

Austria: More than a million persons were informed about the 2007 Researchers' Night initiative during the awareness raising campaign, and more than 10 000 visitors were involved in the events in various locations. Under the ERA-MORE initiative, further information and awareness raising activities were conducted (e.g. mailshots, information events, presentations). The use of a train as a mobile advertisement for ERA-MORE and the Researchers' Mobility Portal (RMPA) initiative was extended till December 2008. The name of the train www.forschung-auf-schiene.at is used as a web domain which routes automatically to the RMPA.

In December 2007, a new Programme called "Sparkling Science" was launched by the Federal Ministry of Science and Research, combining high-level research with science promotion in schools to inspire pupils to pursue a career in science and technology (www.sparklingscience.at).

Belgium: A website was set up to promote studying in Flanders (www.studyinlanders.be). PhD students were among the target audience.

The website www.hersentoer.be contains reports of the dialogue sessions that were organised in 2006-2007 between the Flemish Minister for Economy, Enterprise, Science, Innovation and Foreign Trade and researchers in universities and institutes for higher education. There is also a question and answer section, in which policy in these matters is explained to researchers.

In November a *Seminar on Doctoral Schools* was organised in Flanders in cooperation with the French region Nord-Pas de Calais.

Croatia: The National Coordinator of the Croatian Researchers' Mobility Network presented ERA-MORE and future Mobility Centres' activities at three workshops (REGPOT, IAESTE, ERASMUS) during the autumn. The WEB-MOB mobility guide was distributed by e-mail and in print.

Cyprus: There were three main awareness-raising activities during 2007:

- A "Researchers' Night" event was organised by the Research Promotion Foundation (RPF) on 28 September 2007 with "Research and Quality of Life" as its main theme. Material promoting researcher mobility was distributed, such as the European "Charter & Code" and the new Marie Curie actions of the

7th EU Framework Programme.

- Publication of three quarterly Newsletters by the Cyprus Mobility Centre as part of an EC co-funded project (CYMOCEN). The Newsletters contained information on the recent activities of the Centre as well as the latest developments at European level, including an assessment of the activities of the ERA-MORE Network.
- Publication of the “Researchers’ Guide to Cyprus”, which includes important information for foreign researchers wishing to move to and work in Cyprus.

Czech Republic: A number of awareness raising activities were held, such as:

- the “Science and Technology Week” (STW) — 1 to 11 November 2007 — in coordination with the European Science and Technology Week (lectures by top level researchers, presentations of interesting experiments, workshops, exhibitions and visits to laboratories) <http://www.avcr.cz/tydenvedy/>
- the “Open Science” initiative (offering, since the beginning of 2007, 150 talented high school students a yearly internship — 3 hours a week — in 23 Prague scientific institutes) (<http://www.otevrena-veda.cz/ovroz.html>)
- the “Don’t be Afraid of Science” programme (a set of lectures for high school students with well known researchers putting across science in a friendly way) (<http://www.cas.cz/pred-stredo.pdf>)
- the “Science in the Streets” project (aimed at bringing the general public closer to science and technology) held in Pilsen and Prague. Activities included: Ecomobile — transportation for the third millennium, hydrogen-powered car, tests of what happens in a motorbike crash, etc; a workshop “Science and the Media: Effective communication”, which concentrated on how to make the message more attractive, and avoid mis-interpretation of science (May 2007)
- the new “Little Czech Heads” project (focused on talented high school students and students of higher grades of secondary school; aim: to evoke interest in scientific disciplines among young people and to attract them to a career in research, with awards, a gala evening etc)
- the Researchers’ Night 2007 (main part in Prague, Brno, Pilsen). Additional smaller events at 22 other locations. The project covered the whole country, with wide media coverage, and national TV spots.

Estonia: In 2007 most awareness raising activities initiated during previous years were continued and developed, including:

European Researchers’ Night in Tartu and Tallinn extended to venues in other cities. Estonian Television broadcast live coverage of the Researchers’ Night Show.

Different portals and events (e.g. the third Science Summer School/Camp; family days with more than 1500 visitors in the department of physics of Tartu University, etc.) for promoting research, innovation, new technologies, relations between science, economy and

society.

The Science Bus “Big Dipper” (run by the Estonian Physical Society and Tartu University students of physics) continued to visit all parts of Estonia and over a three-year period visited more than 50% of all schools. The Science Bus is a laboratory on wheels, bringing bright young student-performers with live experiments on physics and chemistry to every small corner of Estonia.

Competition of Young Inventors.

Since 2007, national funding has been provided to support Science Popularisation Activities.

Finland: Awareness-raising sessions were organised around the country by National Contact Points and the bridgehead for Researchers’ Mobility Portal to communicate opportunities for mobility to a wider audience (universities, research institutes, private sector).

France: A few projects covering a large part of France were financed under the Researchers’ Night initiative: <http://www.nuitdeschercheurs-france.eu/nuit2007/index.htm>.

The Louis Pasteur University in Strasbourg coordinated the Night for the North and the East of France around a polar theme, with scientific experiments involving some 3700 persons. The University of Angers coordinated a Night for the West of France, focusing on information and communication technologies, with concerts, exhibitions, workshops and projects in various towns.

Greece: The national Mobility Centres Network ran a 6-month project as part of Researchers’ Night to promote national and European research policies related to the researchers’ profession within Greek society. The Charter and Code were publicised. The project also proved to be a good opportunity for promoting the national network and the portal. The project funding made a considerable contribution to the network’s financial resources. More than 4 700 visitors participated in three Researchers’ Night Events in three large Greek cities, and more than 120 000 people in Greece were informed about the 2007 Researchers’ Night initiative.

Iceland: Researchers’ Night has become a well-known event in Iceland. Some 1 350 people were present at Researchers’ Night on 28 September 2007, which is a similar number to 2006. Fifty thousand copies of a paper on research and the Researchers’ Night were published a couple of days before the event and distributed free among the public. Over 100 projects from universities, research organisations and companies were exhibited. The media coverage was good, on television, radio and the web.

Ireland: National ERA-MORE Network Training and Information workshops were held in January, May and December in conjunction with network meetings. National changes in entry condition legislation and an update in the application of the Charter and Code were the themes for the first workshop, with the main objective of ensuring dissemination to the widest possible audience via the network members and associated agencies.

The second workshop took a “train the trainer” focus and featured a question and answer session with agencies on the visa package. The official implementation of the Directive

and launch of the new scheme took place in December 2007 and was co-hosted by personnel from Immigration, Department of Enterprise, Trade and Employment and the Department of Justice, Equality & Law Reform (D.J.E&LR). Promotion of ERA-MORE was also on an international scale — co-funded by the Irish Universities Association and Expertise Ireland (<http://www.expertiseireland.com>).

Italy: For the Researchers' Night 2007, four projects were selected by the Commission for funding, and there were three other associated events (which benefited from information and promotional material provided by the Commission). The events took place in the national research centre and universities, with the collaboration of interested municipalities. In 2007, there were two further major national events devoted to science and research. In March, the Italian Ministry for Universities and Research organised the XVIIth edition of the Week of Scientific and Technological Culture, with a view to promoting Science and Technology to the public. In the autumn, the Genoa Science Festival, based on an interdisciplinary approach, was organised with the same purpose, and attracted more than 200 000 participants. It featured 500 events with exhibitions, laboratories, conferences and round tables, music, performances, etc., setting out the results, questions and main issues of scientific research in thematic areas of interest for citizens: climate change, biodiversity.

Lithuania: Elements of the national “Science and technologies popularisation programme” were run during 2007: the annual national science and technology festival in autumn, that covers most science and studies institutions in the bigger cities; thematic seminars; new websites on science and innovation; various publications; TV, radio programmes, etc.

Norway: The ERA-MORE Norway project organised three national information conferences on mobility issues for administrators at R&D institutions, and printed and disseminated an English information brochure for incoming researchers to Norway. It also came up with a publication (Tell'us) on Norway's new excellence Centres for Research-based Innovation (CRI) and ERA-MORE and mobility issues. The “Researchers' Night 2007 in Norway” was organised as an add-on to the National Science Week and included 14 special events, a special supplement distributed with two nation-wide newspapers, and articles and media releases in the printed press, on TV, websites, and succeeded in reaching the Norwegian population at large.

Poland: The 11th annual Festival of Science (21 to 30 September 2007 in Warsaw) consisted of workshops, conferences, lectures, debates, films and guided tours in laboratories, and a variety of experiments — together with more than 500 activities, lectures, workshops and experiments.

The areas of interest varied from astronomy, chemistry and physics, to philosophy, psychology and social sciences (programme of the Festival in Polish <http://festiwal.icm.edu.pl/2007/program/program.html>). The Festival encouraged many people to take a closer look at science, generating discussions on subjects presented at the Festival.

During the Festival the 2007 Researchers' Night (28 September 2007) took place. Many laboratories opened to the public, and the entire event generated great interest.

Romania: The National Authority for Scientific Research organised from 2-6 October

2007 the 6th annual “Romanian Research Exhibition” and the “INVENTIKA Exhibition”. The decision was taken to extend these events at regional level, under the heading “Research Regional Exhibitions”. Furthermore, on 19 November (as every year), in the presence of high level officials from the Presidential Administration, Parliament and Government, the “Researcher and Designer’s Day” was celebrated. The date has a special significance, being the birth date of Prof. Dr George Emil Palade, a Nobel Prize winner of Romanian origin.

Slovakia: Under the umbrella of the “Strategy for the Popularisation in Society of Science and Technology” adopted by the Government in February 2007, various initiatives took place:

A programme of the Agency for R&D Support focusing on human potential in the area of R&D and science popularisation was approved, aimed at improving the relationship of young people to science and increasing the attractiveness of careers in science, and at improving public understanding of R&D expenditures in the state budget.

During the Week of Science 2007, some 200 events were organised by different ministries, regional and local government offices, R&D associations, research organisations, higher education institutions and schools throughout the whole country. Twenty partners took part in promoting the Week.

Slovakia took part for the first time in 2007 in the Researchers’ Night. Different activities (e.g. science show, drawing competition, photo exhibition) were held in five Slovak cities and were attended by more than 4 000 visitors.

Spain: 2007 was declared the “Year of Science”, with the objective of fostering scientific culture to improve dialogue between the scientific world, the technological world and society, and to get people more involved in scientific and technological debates. The Year of Science also sought to disseminate scientific results in the media, to increase the interest of the population and to boost the standing of scientific careers.

Related to the Year of Science, four working groups of experts were created: 1) Diffusion and Science in the media, 2) Public Research Organisms, 3) Coordination of all Autonomous Communities for the Week of Science and 4) Coordination of all Ministries involved in R+D activities.

A new web page was also created (www.ciencia2007.com).

Switzerland: In September 2007 the Swiss Researchers’ Night was successfully launched in Zurich. More than 5000 visitors gathered in the centre of the city, examining and discussing cutting-edge scientific projects with local researchers. For one night, more than 150 researchers of ETH Zurich (Swiss Federal Institute of Technology), the University of Zurich, Empa and IBM Research Rüschlikon left their laboratories to set up their computers and equipment at the lakeside. The event was organised jointly by the [Corporate Communications of ETH Zurich](#) and [Euresearch Zurich](#).

In December 2007, the Rectors’ Conference of the Swiss Universities (CRUS) organised a seminar in Zurich for the European members of the Academic Cooperation Association and the Swiss Higher Education Institutions (HEI) on ERA-MORE and Charter and Code for Researchers.

Turkey: The effectiveness of the structure and *modus operandi* of the Turkish Mobility Network (TR-MONET Project) was evaluated. With the participation of relevant ministries and representatives of public and private institutions, a roadmap was prepared for the sustainability of the Mobility Centres (MoCs) after the EC set-up funding came to an end. Staff of the MoCs participated in the ERA-MORE training organised by the EC and exchanged knowledge and experience internally with other Mobility Centres in Turkey. Representatives of the bridgehead organisation participated in evaluation training, which was of great value for the sustainability of the Turkish Network of Mobility Centres.

2.3.3. Prospects

A call for proposals was launched in November 2007 for the organisation of “Researchers’ Night” 2008, with a view to extending the geographical coverage of the events, and enhancing their European dimension, notably by way of a photograph competition for young people and schoolchildren in association with each selected project. This initiative was based on the successful drawing competition organised for the previous Researchers’ Night.

2.4. Studies /statistics

2.4.1. At EU level

In order to obtain more information on researchers, DG Research commissioned the Institute for Prospective Technological Studies (IPTS) of the Joint Research Centre to run a project called the *Integrated Information System on European Researchers (IISER)*. It produced²¹ ten indicators grouped into three categories:

Number of researchers (stocks)

1. Number (and forecasting) of researchers in the EU
2. Number of researchers in the training phase and post-docs
3. Number of researchers recruited under a permanent contract in R&D
4. Average time from graduation to a first regular employment contract in R&D Mobility patterns (flows)
5. Circulation of researchers within Europe
6. Number of researchers leaving Europe
7. Number of researchers coming to Europe
8. Circulation of researchers between public and private sector

Why researchers are moving (motivational aspects and career paths)

9. Motivations for R&D careers

²¹ The report is available at http://ec.europa.eu/eracareers/pdf/indicators_on_researchers_en.pdf.

10. Satisfaction of researchers with their jobs and careers.

Furthermore, data on mobility of researchers were obtained through two surveys on:

- young researchers (PhDs and post docs) in university research teams in life sciences;
- young researchers in research teams in social sciences and in engineering.

A study on the *remuneration of researchers in the public and private sectors*²² (May 2006 — February 2007) provided comparable information for various European countries and the EU's main competitors.

Several measures were initiated with Eurostat in order to improve current data collections:

The UNESCO, OECD and Eurostat (UOE) data collection was improved in two major areas: more countries to provide data separately for ISCED²³ 5 (graduate level) and 6 (doctoral level), and more attention to the question of mobility. A pilot data collection on mobility of students has been conducted since 2005 (reference year 2004) and continued in 2007.

Research and Development (R&D) survey: Eurostat collected in 2007 quality reports on the R&D survey as requested by European Parliament/Council Decision No 1608/2003/EC.

The Career of Doctorate Holders (CDH) survey²⁴ is a survey launched by Eurostat, OECD and UNESCO, to complement current data collections. The CDH builds on existing work. Surveys on doctorate holders currently exist in 17 countries but with various objectives, populations (e.g. doctorates, graduates) and frequency. As a consequence, the information is not currently useable for international comparisons. Work on the CDH was carried out in co-operation with an Expert Group representing some 40 countries from all over the world. This group met three times in 2005 and 2006. Project components were validated by the OECD, UNESCO and Eurostat in 2006. Argentina, Australia, Canada, Germany, Portugal, Switzerland and the US were included in the test output. Eurostat took stock of the progress by hosting an Expert Group meeting in Luxembourg on 26-27 April 2007. The data collection with reference year 2006 was completed by mid 2008, and a broader evaluation of the national implementation of the CDH took place in the second half of 2008, together with the revision of the CDH package. The first results were expected by December 2008.

The objectives of the RINDICATE study (December 2007 – May 2008) were to present evidence on six factors identified in the context of the Green Paper on ERA as inhibiting mobility and career development of researchers. These are:

- (1) The current arrangements and practices concerning social security (e.g. statutory and supplementary pension rights, unemployment benefits).
- (2) The lack of competition-based internationally open recruitment.
- (3) The lack of recognition of mobility in recruitment and career development.

²² The report is available at http://ec.europa.eu/eracareers/pdf/final_report.pdf.

²³ [International Standard Classification of Education.](#)

²⁴ See <http://www.oecd.org/dataoecd/17/57/38055153.pdf>.

- (4) Unattractive and precarious employment conditions (including the potential impact of “flexicurity” models on researchers’ needs).
- (5) A lack of transnational portability of grants/funding.
- (6) The lack of adequate training and the skills agenda for researchers.

Over a period of six months, the study team generated, analysed and presented evidence for each of these six factors, to support further policy initiatives in the field of mobility and career development of researchers within the EU.

2.4.2. At national level

Some 20 EU countries are involved in the above mentioned CDH survey. Eurostat granted support with a view to broadening the scope by launching a call in 2006. Countries participating delivered data between December 2007 and April 2008. Grant agreements were signed with eighteen EU Member/Associated States²⁵, while other Member States participated by covering all or part of the components without applying for a Community grant.

Examples of action reported at national level are:

Austria: A Study “Bachelor New and the labour market” (*“Bachelor Neu und der Arbeitsmarkt”*) was prepared as a basis for further measures and strategies at national level (http://www.uni-lu.ac.at/wiho/downloads/studie_bachelor_FINAL.pdf).

Belgium: A research group at Ghent University worked on a project on the *quality of life of foreign researchers in Flanders*. At a first stage, indicators were drawn up. The *Policy Research Centre for R&D Indicators (2007-2011)* is a 5-year project funded by the Flemish Government. It will provide R&D indicators on research output and research potential, as well as carrying out scientific research in each of these fields. As partner in the SOOI (“Steunpunt O&O Indicatoren”) project, Ghent University coordinates the themes of doctorate production and researchers’ intersectoral and international mobility, to develop a monitoring system for doctorate production in Flanders and provide the Flemish Government and Flemish universities with more up-to-date, reliable, and policy-relevant indicators.

Estonia: The survey of the ERA-MORE Network related to researchers’ mobility in Estonia was published in English and Estonian, and disseminated to stakeholders and the wider public. The publication *Researcher mobility in Estonia and Factors that Influence Mobility* is available on: (http://www.archimedes.ee/mobiilsus/Teadlasmobiilsus_2006_en.pdf).

Finland: The Academy of Finland published results from a survey on the motivating and discouraging factors of Finnish researchers’ international mobility. The Finnish research sector and researchers’ career pathways have become increasingly diverse, calling for more flexible and responsive funding instruments and services that recognise researchers’ individual needs. The study shows that the main challenges to Finnish researchers’ international mobility are largely family and funding-related. The report is called

²⁵ (Austria, Belgium, Bulgaria, Czech Republic, Croatia, Cyprus, Denmark, Estonia, Latvia, Lithuania, Malta, Portugal, Romania, Slovak Republic, Spain, Sweden, Iceland and Norway).

“Academic Finns abroad — Challenges of International Mobility and the Research Career” and can be found in www.aka.fi/publications (7/07).

France: The Ministry in charge of Higher Education and Research created a monitoring centre to improve the information on scientific employment and to identify employment prospects. This centre collects, organises and analyses the data by comparing them with international information.

In 2007, it published a first “Review of scientific employment in France” which included the state of play on scientific employment, both in the public and in the private sector, and forecasts for the future (<http://www.recherche.gouv.fr/cid5765/l-etat-des-lieux-emploi-scientifique-france.html>)

Germany: An ambitious study was conducted on behalf of the Federal Government in preparation for the first Federal Government Report on the Promotion of Young Researchers (“Bundesbericht zur Förderung des Wissenschaftlichen Nachwuchses”, BuWiN). The Report analysed the situation of young researchers in Germany and made recommendations for further development and reform measures. A central objective of the Report was to identify information deficits and further research needs. In a further phase, it is intended to establish a reporting system on the situation and further development of young researchers in Germany (see the complete report at Informationssystem “Wissenschaftlicher Nachwuchs”, www.kisswin.de).

Iceland: The Icelandic Research Centre — RANNIS regularly compiles information about newly graduated PhD holders of Icelandic nationality, home and abroad, as well as foreigners graduated in Iceland. The database provides important statistics on Icelandic doctorate holders and is the basis of RANNIS’s participation in the Nordic and Baltic countries’ collaboration on doctoral statistics (NORBAL) funded by NordForsk (an independent Nordic research institution under the Nordic Council of Ministers for Education and Research). Iceland is also part of the EC project “*MOREBRAIN — From Brain Drain to Brain Gain*”, one of the FP7 co-ordination actions within the framework of ERA-MORE. This project will investigate why researchers emigrate from Europe and what new mechanisms could be developed to either attract them back to Europe or benefit from their expertise in other ways.

Ireland: Ireland is also involved in the EC project “*MOREBRAIN — From Brain Drain to Brain Gain*”. In addition, an annual study *Experiences of Incoming & Returning Researchers to Ireland* was carried out with non-Irish researchers living or previously living in Ireland.

Italy: One of the activities for the C&C involved some universities carrying out statistical studies to verify the situation concerning the application of the principles of the Charter and Code.

In some universities and research centres a questionnaire on the C&C principles was submitted to researchers at all levels of scientific careers.

The *Questionnaire for researchers*, aimed at investigating obstacles and critical issues that foreign researchers face in Italy, was also run by a specific working group co-ordinated by the CRUI (Conference of Italian University Rectors) Foundation and the ERA-MORE Network. The paper, reporting the most critical issues emerging from the

questionnaire, was published in the quarterly review of the CRUI Foundation “*Quaderni*”, available on line (www.cru.it).

Norway: Incoming young researcher mobility is substantial and still increasing: in 2007 almost 25% of doctoral degrees in Norway were obtained by foreigners (twice the number for 2000).

Slovenia: A thorough overview of national legislation on the mobility of researchers and particularly the hosting of foreign researchers was carried out. In August 2007, the Minister for Science requested the main university departments and research institutes involved in Marie Curie actions to point out the obstacles to the smooth implementation of mobility projects, and to make suggestions for change. Several areas that would require intervention by the Ministries for Finance and Labour were defined, and work on adjusting research working conditions was set to continue. Salaries for young researchers and the taxation situation of young researchers were further points of focus.

Spain: Studies and statistics related to the R&D labour market, released in 2007, are available at <http://sise.fecyt.es/Estudios/estudios.asp>

2.4.3. Prospects

The next Career of Doctorate Holders (CDH) meeting was scheduled for 1&2 December 2008 in Brussels.

The follow up of the IISER project was due to be launched in 2008 with a call for tender.

3. A MORE ATTRACTIVE LABOUR MARKET

3.1. Charter & Code (C&C)

3.1.1. At EU Level

In 2007, the Commission continued to support the process for getting more and more organisations to sign up²⁶ to the *Recommendation on the European Charter for Researchers and the Code of Conduct for their Recruitment*. Two years after the publication of the C&C, a first European-wide stocktaking exercise was contracted out by the Commission to Deloitte/The Evaluation Partnership — *Evaluation of Communication and Information activities relative to the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers*. It shows that, despite having 867 public institutions signatories (none yet from the private sector), there is still a lack of knowledge about the C&C. Accordingly, national reports show that awareness of C&C among the whole researchers’ population, from doctoral candidates to senior researchers, is still very low. A number of institutions in almost all Member States (plus Israel, Norway and Switzerland) have signed the C&C as a sign of commitment to the underlying principles, but irrespective of such official endorsement, the information has seldom reached the people that would most benefit from the C&C recommendations.

²⁶ List of undersigning organisations available at: <http://ec.europa.eu/eracareers/europeancharter>.

Moreover, the actual implementation of the C&C at national and institutional level is still slow and of uneven quality. The Commission therefore asked whether it was feasible to set up some mechanism for speeding up the process and making signing-up on the part of research organisations more high-profile. A working group was set up by the Commission to explore this issue, under the understanding that the system should remain light, flexible and respectful of the autonomy of the research institutions.

3.1.2. At national level

Examples of action at national level are:

Austria: In May 2007 Austria's Minister for Science and Research signed the C&C, thereby making a clear political commitment. In line with the ERA-MORE "Update 2007", national stakeholders were once again informed about the C&C and the importance of implementing C&C principles. The list of signatory organisations is available at: http://ec.europa.eu/eracareers/index_en.cfm

Belgium: In 2007 the *University of Hasselt* declared its agreement with the principles of the C&C.

In 2007 several meetings were organised between the Flemish Minister for Economy, Enterprise, Science, Innovation and Foreign Trade and researchers in universities and institutes for higher education under the title "*Hersentoer*" (Brain Tour). The European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers were used as the conceptual framework for setting up the dialogue.

Due to changed rules governing the scientific commissions of the Research Foundation — Flanders, and in application of the C&C's principles, an open call was launched in 2007 for new members of the scientific advisory commissions of the Research Fund Flanders.

Bulgaria: In October 2007 the Rectors' Conference of the Republic of Bulgaria adopted a decision at its general meeting to sign up to the European C&C.

This result was reached after a long process, initiated by the Ministry of Education and Science, which continued in 2007 with a number of open debates with Bulgarian rectors. Several round tables were organised by the Ministry of Education and Science on working conditions for researchers. The Rectors' Conference devoted a comprehensive study to PhD degrees in Bulgaria and the European dimensions. It stimulated dialogue on doctoral degrees and researcher career paths. The Bulgarian Rectors' Conference agreed to make all necessary changes and introduced conditions to align national processes in the area of higher education and research with the main EU policies.

Cyprus: In December 2007, the Research Promotion Foundation submitted a proposal to the Cypriot Council of Ministers recommending the formal adoption of the C&C by all research organisations and institutions in Cyprus. This action was to be followed by a further campaign aiming to raise awareness of the two European Commission recommendations and the need for them to be adopted by Research and Academic Organisations in Cyprus.

Czech Republic: The representatives of Ministries, end-user and expert public and other bodies of the central state administration agreed with the C&C and committed themselves

to complying with it and promoting it. As required by the Prime Minister, the principles of the C&C were taken into account during preparatory work on the next National Policy of R&D. In 2007 the C&C also served as one of the key documents for preparing the Ethical Code of the Masaryk University in Brno. Such codes are being applied at both state and private universities in the Czech Republic (e.g. University of Economy in Prague, West Bohemian University in Pilsen, Technical University Liberec).

Finland: The C&C were acknowledged in preparations for the Finnish Action Plan for Researcher Education and Researcher Careers 2007-2011, which was adopted by the Minister of Education in January 2007.

France: French authorities supported the C&C at the time of its adoption by the Commission and have regularly organised meetings with the institutions concerned to make a review of its implementation. In 2007, 16 French organisations signed the Recommendation. France mentioned in the “Pact for Research” the importance of the European Research Area and the signature of the C&C for institutions.

This effort was underpinned by the adoption of the law of 10 August 2007 concerning the autonomy and responsibilities of universities, which makes them more attractive, in particular by shortening recruitment procedures and staff careers and enhancing the situation of young researchers. The idea is for universities to help young researchers become more independent, recognise their merits, and thus open up new horizons for them.

Greece: The General Secretariat for Research and Technology (GSRT), with the assistance of the national Mobility Centres network, succeeded in disseminating information about the C&C to all interested parties. More specifically, each of the ten Mobility Centres, operating at regional level, continued to circulate information by all appropriate means (research committees, liaison offices, career offices, offices of International Relations etc) based in universities or research centres. Moreover, the C&C were promoted via information days and other meetings organised by the GSRT, and leaflets provided by the Commission were distributed to participants. The recommendation also appears on the websites of the Mobility Centres and several research centres in Greece.

Iceland: On 4 May 2007, several universities endorsed the Commission’s recommendation on the C&C, which was largely consistent with established practices in Iceland.

Ireland: The Charles Parsons Energy Research Awards²⁷ selection criteria, aimed at developing overall research capacity, particularly in priority areas of energy research, refer to the C&C. The parent institutions of the research groups selected to receive Charles Parsons awards will be responsible for the recruitment of researchers and students according to standard guidelines. These include the European Researchers C&C and appropriate national guidelines. A coordinated approach will be made to raise international awareness of the awards in an attempt to target mobile young researchers. The C&C is a key item at all ERA-MORE presentations and events.

²⁷ <http://www.dcmnr.gov.ie/Energy/Guide+for+Applicants.htm>.

Italy: A web site (cartaeuropeadeiricercatori.it) was created to monitor the implementation of the C&C within Italian universities and public/private research institutions. In November 2007 the SIPS (Italian Society for the Progress of Sciences) committed itself to getting the C&C principles applied among Italian research institutions. Most of the principles are innovative for Italian universities, and pinpointing other universities as partners in the C&C implementation and monitoring operation was considered as good practice, as is the case with Swiss universities.

Luxembourg: The C&C were taken as the basis for a new law governing the researcher (early stage and post-doc) scholarship system. The main elements are the introduction of short-term employment contracts for scholars, the transportability of scholarships (international and intersectoral) and the openness of the system to candidates from abroad or being trained abroad. A research institution in Luxembourg also signed the C&C.

Norway: The C&C were promoted by the ERA-MORE project, and during the “Forskingsdagene” National Science Week 21-30 September 2007, during the “Researchers’ Night” 28 September 2007, in a publication (Tell’us) on Norway’s new excellence Centres for Research-based Innovation (CRI), and at three national information conferences on mobility issues for administrators at R&D institutions. Further, the Research Council of Norway (RCN) got the Norwegian Rectors’ Conference (UHR) to establish a Working Group to establish how and on which issues the C&C elements deviate from Norwegian law and practice at R&D institutions.

Slovenia: The awareness-raising campaign for the ERA-MORE network comprised several presentations of the recommendations and principles under the C&C. The presentations were an add-on to the Marie Curie Actions and were supported by the distribution of C&C texts in Slovenian and English.

Spain: Following the publication of a new Trainee Research Personnel Statute, which included the C&C principles, all public calls of the Ministry of Education and Science have included the researchers’ and employers’ commitment to the general principles of the C&C. Every institution applying for these calls must therefore comply with the C&C principles.

UK: During 2007, a UK Higher Education sector working group published a draft Concordat to support the Career Development of Researchers. It is planned that this will effectively sign the UK up to the European C&C.

This work followed on from the completion, in 2006, of a gap analysis comparing the European C&C to existing legislation, guidelines and good practice in the UK. The draft revised Concordat was published for consultation at the beginning of July 2007 and comments were received from a range of sector groups, institutions and individuals.

It is intended that the revised Concordat should provide a clear, high-level statement of the signatories’ expectations for the support and management of researchers; an explanation of the purposes for which it has been developed; and a small number of key principles. It should also provide an operational framework within which institutions could consider the effectiveness of their individual approaches to the management and support of researchers and should include advice about the rights and responsibilities of employers and researchers.

The main benefit of the revised Concordat will be as a single, unambiguous statement of the expectations and responsibilities of research funders and institutions with respect to the management of researchers. It will also demonstrate internationally the high standards of management and support that can be expected by researchers working in the UK.

Signatories to the Concordat include the UK Research Council, universities and the major funding bodies of the UK, including the Higher Education Funding Councils for the Devolved Administrations. In endorsing the principles of the Concordat, the signatories will also be adopting the principles of the European C&C. The Concordat was due to be officially launched in 2008.

Switzerland: The Rectors' Conference of the Swiss Universities (CRUS) decided in July 2007 to support the institutional implementation of the C&C on a national level by investing federal means in two areas of interest: the education of doctoral candidates and the enhancement of equal opportunities, primarily by focusing on recruitment procedures.

The underlying logic, synergies and models for a "Swiss Label Mechanism" in the Swiss Higher Education Institutions (HEI) were defined in two CRUS sessions in 2007, taking into account the results of the "Label Working Group" of the European Commission, the results of the Swiss pilot project and the results of the Swiss ERA-MORE annual conference 2007. The Swiss C&C label mechanism applies the European C&C principles as important signposts within existing institutionalised processes such as quality assurance mechanisms.

3.1.3. Prospects

In 2007, and despite strong commitment in some Member States, the *implementation process* of the C&C remained relatively slow and piecemeal. A lot remained to be done in terms of awareness-raising action among researchers and non-signatory institutions. Progress was also sluggish on its incorporation into institutional arrangements.

The Commission has continued to co-ordinate work on a voluntary and flexible implementation *mechanism* for the C&C.

The '*Impact Study*' evaluating the communication and implementation activities of the C&C proposed specific recommendations. The main follow-up will be the creation of a C&C Information Network to support and raise awareness of the C&C at national level. There might also be a new brochure.

3.2. Social security & taxation

3.2.1. At EU level

Under the ERA Green Paper process, social security and portability of supplementary pension rights were part of the analysis made by the ERA Expert Group "Researchers". The Expert Group analysed the key aspects of these areas which are particularly relevant for researchers.

More appropriate use of EU legislation and improved access to existing information were addressed. A variety of initiatives to be undertaken at EU and national level to improve researchers' career attractiveness as well as mobility, was included in the Expert Group Report (April 2008).

These elements were considered in the Communication “**Better careers and more mobility: a European Partnership for researchers**”,²⁸ which represents the ERA Green Paper follow-up initiative for creating an open and attractive EU labour market for researchers (see below).

In the specific field of portability of supplementary pension rights, a draft **Directive on improving the portability of supplementary pension rights**²⁹ is under negotiation. It is designed to reduce the obstacles to freedom of movement across Member States and to mobility within any Member State stemming from provisions contained in supplementary pension schemes. Once approved, it may have a significant impact on “acquisition” and “preservation” rules on supplementary pension rights of, in particular, highly mobile workers holding short-term contracts, such as researchers who suffer particularly from the lack of consistency between different supplementary pension schemes.

3.2.2. At national level

National level is of particular importance in the field of coordination of social security, as social security schemes are a matter of national competence and are not harmonised. Each Member State is therefore competent to define who is covered and under what conditions.

Austria: An information event “Update 2007” by the ERA-MORE Mobility Centres was held to inform Local Service Centres and stakeholders on legal, social security and tax issues in order to exchange information and experience within the network.

For Marie Curie Incoming Fellows, the Mobility Allowance and the Travel Allowance were made tax-free by adapting the “*Wartungserlass zur Lohnsteuerrichtlinie*” (statement of practice governing the application of the income tax guidelines).

Germany: The German Rectors’ Conference (HRK) established a C&C Working Group and decided to concentrate its efforts on the issue of transferability of pension rights, including supplementary pension rights. The working group organised a hearing of national experts on the issue. It took also note of the results of the Green Paper expert group “Realising a single Labour Market for Researchers”. The HRK was asked by the German Federal Ministry for Education and Research to initiate an official Bologna Conference on these issues, which took place in Berlin on 11-12 June 2008 under the title “Penalised for being mobile? National pension schemes as an obstacle for researchers in the European Higher Education Area (EHEA)” (see www.eracareers-germany.de).

Norway: In Norway all researchers including PhD and post-doc grantees are considered post-graduate employees and thus enjoy normal social security entitlements, including pension rights and maternity leave. In 2007 the public offices for assistance on social security and unemployment were merged, and joint service centres for foreign employees were established — combining the offices of immigration, police, tax and work permit authorities — for improved coordination of services and assistance and easier access for the public.

Romania: Romania signed conventions for the avoidance of double taxation with all EU Member States. According to the tax law, the incomes generated by a patented invention in

²⁸ COM (2008) 317 final; SEC (2008) 1911 ; SEC (2008) 1912.

²⁹ Amended Commission proposal COM(2007) 603 final on minimum requirements for enhancing worker mobility by improving the acquisition and preservation of supplementary pension rights.

Romania are exempted from taxation in the first five years from the date of its application.

3.2.3. Prospects

The Communication “**Better careers and more mobility: a European Partnership for researchers**”³⁰ includes a set of actions aimed at improving researchers’ career attractiveness and mobility, related to social security coordination and portability of supplementary pension rights. These actions concern the access to readily available information on the application and better use of the existing legal framework on social security rules. Also portability of supplementary pension rights will be addressed through the assessment of the feasibility of soft law instruments and setting up EU pension funds targeted at researchers.

3.3. Doctorate holders

3.3.1. At EU level

DOC CAREERS — “From Innovative Doctoral Training to Enhanced Career Opportunities” — (2006-2008) explored, with financial support from Eurostat, the relations between doctoral training programmes and career development and employability prospects for doctoral candidates.

The project aims at establishing a dialogue between a wide range of practitioners involved in higher education and research, industry and other stakeholders and policy makers across Europe. This would establish a basis for consensus-building for certain initial concrete steps in implementing EU initiatives.

DOC-CAREERS is ground-breaking in a number of respects: by underlining the need to incorporate demands from a highly diversified labour market directly into the planning of doctoral programme structures; by introducing case studies among employers to highlight such demands; and by focusing on mobility as an inter-sectoral as well as a cross-border activity. The project investigates:

development of transferable skills and competences in the context of employability and career perspectives in the public and private sectors;

nature and extent of university and industry collaboration in doctoral programmes;

mobility strategies for career development within doctoral training;

requirements for more systematic collection of data at the university level to provide the basis for analysing doctoral candidates’ career paths.

3.3.2. At national level

Austria: In order to offer more structured PhD training, Austria has developed a new funding scheme called “Doktoratskollegs-Plus” (Doctorate Colleges Plus). The programme motivates universities to offer state-of-the-art structural training with an international focus for highly qualified PhD candidates. This should qualify PhDs for the scientific job market — mainly in academia but also in industry. Besides, the programme should enhance the building of

³⁰ COM (2008) 317 final; SEC (2008) 1911 ; SEC (2008) 1912.

centres of scientific excellence in Austria. <http://www.fwf.ac.at/de/projects/dk.html>

The association “Universities Austria” (the Austrian Rectors’ Conference — re-named with effect from 1 January 2008 — http://www.uniko.ac.at/oesterreichische_rektorenkonferenz) published in December 2007 recommendations on doctoral studies in line with the Bologna Process to facilitate the implementation of state-of-the-art doctoral studies.

(http://www.uniko.ac.at/upload/Empfehlungen.OeRK.Doktoratsstudium.neu.2007_Endversion.pdf).

Belgium: In November 2007 a scheme was set up to (re)integrate Belgian or foreign researchers working abroad. The point of the funding, granted under “*Scientific Impulse Mandate — ULYSSES Mobility*”, is to encourage Belgian or foreign, highly qualified researchers, who currently have a scientific career abroad, to develop it in a university of the French Community. The mandate is granted for a maximum period of three years (first mandate of two years, possible extension of one year). The project promoter will be granted a maximum of 200 000 euro per year.

The Methusalem programmes of the Flemish community started in 2007. These complement the Odysseus programme, which is directed to attracting top postdoctoral scientists to Flanders, regardless of their nationality. Methusalem targets top scientists who are already active in Flemish universities and provides them with a substantial amount of structural funding for their laboratories on the basis of proven merit.

The Region of Brussels-Capital enlarged at the end of 2007 the “Research in Brussels” programme, aimed at fostering cooperation and mobility between researchers. It is now called “Brains back to Brussels” and its objective is to invite high-level scientists to come to, or to return to, the academic research world in Brussels.

Estonia: In 2007, the system of post-doctoral grants was redesigned in cooperation with the Ministry and the Estonian Science Foundation. In particular, the size of the grants will increase considerably, and the grants will be available for outgoing mobility (up to now, they were given only for research in Estonian R&D institutions). The call for proposals opened in autumn 2007, based on the new rules.

In 2007, the system for grants for top-level researchers was further developed. Researchers coming to work in Estonia from abroad, including repatriate researchers, can now establish their own research group. The size of the grant was approximately 1.5 million EEK (personnel costs, research costs, costs of support staff, relocation allowance) per top-level researcher per year, and project duration is up to five years. The host institution provides the infrastructure necessary for the project.

France: With a view to promoting a better mutual exchange of knowledge between universities and business, a system of “doctorant-conseil” was tested in 2007-2008. It consists of a placement by a doctorate holder in an enterprise, an administration or a local or regional authority in parallel to his/her work related to the doctorate within a research unit. All doctoral students with a short-term contract (with a Ministry, research institution, region etc) related to higher education (MIES) can benefit from this system. Students can thus alternate between higher education and placements as “doctorant-conseil”. Some 500 posts as “doctorants-conseils” were to be set up for this experiment in 2007-2008.

Italy: In 2007, several Doctoral Schools were organised to enhance the career development of doctoral candidates, through the acquisition of transferable skills and competences that facilitate employability, in both the public and private sectors. An important objective for Italian Doctoral Schools is to make them more attractive to foreign PhD candidates in order to improve geographical mobility and the dialogue with foreign enterprises or with job placement centres. This is also due to specific indicators which emphasise the internationalisation of the doctoral level. In some Doctoral Schools an internship in centres for applied research and in enterprises is strongly advised during the course of study.

The Italian association of Doctoral candidates and Doctoral holders (ADI) carried out a specific survey addressed to Doctoral holders, seeking information on their satisfaction about the training received and on their employability and career success. The results (available at the web site www.dottorato.it) were disseminated at national level by the ADI during a national event hosted by CRUI (the Conference of Italian University Rectors).

3.3.3. Prospects

The DOC-CAREERS project will examine examples of good practice in devising new structures for doctoral training in Europe, and should lead to enhanced career development through transferable skills acquisition and inter-sectoral mobility. It seeks to establish a dialogue between a wide range of practitioners involved in higher education and research, industry and other stakeholders and policy makers across Europe, creating a basis for consensus-building upon which some first concrete steps in implementing those EU initiatives could be taken. The final report and recommendations are due to be published by the end of 2008.

4. A MORE OPEN LABOUR MARKET

4.1. Visa package

4.1.1. At EU level

By the end 2007 a minority³¹ of EU countries had officially finalised the transposition of the “scientific visa” directive³² aimed at facilitating administrative procedures for third-country researchers entering the European Community, but the process was ongoing in a number of others. The Recommendation on easing short-term visa procedures has not had a significant impact on national procedures³³.

³¹ The situation improved significantly later on: in October 2008, 21 out of the 25 Member States concerned had notified what they identified to be measures fully transposing the Directive: Austria, Belgium, Bulgaria, Czech Republic, Estonia, Finland, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Poland, Portugal, Romania, Slovenia, Slovakia, Sweden and the Netherlands. For Cyprus and Luxembourg, legislation has been adopted, but notification procedures are under finalisation. Denmark and United Kingdom are not involved.

³² Council Directive 2005/71/EC of 12 October 2005 on a specific procedure for admitting third-country nationals for the purposes of scientific research (“Scientific visa”) O.J. L 289/15 of 3.11.2005.

³³ Recommendation of the European Parliament and of the Council of 28 September 2005 to facilitate the issue by the Member States of uniform short-stay visas for researchers from third countries travelling within the Community for the purpose of carrying out scientific research (2005/761/EC).

4.1.2. At national level

Belgium: Directive 2005/71/EC was fully transposed in Belgium in October 2007. The procedure for the approval of hosting research organisations was ongoing. The “Scientific Visa” package is thus fully operational in Belgium.

Bulgaria: The transposition of the scientific “visa package” took place as follows:

Amendments in the Law for foreigners in the Republic of Bulgaria;

Amendments and supplements to the Regulation for conditions and the order for issuing, refusing and withdrawing permission to foreigners to work on the territory of the Republic of Bulgaria;

Amendment and supplement to the Regulation for conditions and order for issuing visas;

Amendments to the Law on vocational qualifications

Czech Republic: Directive 2005/71/EC was transposed via an amendment to the Act on Foreign citizens’ residence on the territory of the Czech Republic (Act No 326/1999 Coll.) — by Act No 379/2007 Coll., dated December 5, 2007. These amendments are set out in paragraph 27 by the inclusion of a new Article 3 and in paragraph 42 by the inclusion of a new Article F (1-5). This new act was published on December 21, 2007.

Estonia: Changes to Estonian legislation implementing the directive on a specific procedure for admitting third-country nationals for the purposes of scientific research were adopted by Parliament on 15 November 2007 and came into force on 1 December 2007.

France: The new system works as follows: a card is issued to a foreigner with at least the equivalent of a master’s degree, carrying out research or teaching in a higher education institution, under a convention which certifies his/her capacity as a scientist and the subject and the length of his/her presence in France.

This card is the equivalent of a work permit. In addition, a residence permit for “private and family life” is automatically issued to the spouse, on condition that his/her entry on French territory has been legal. This card also authorises his/her employment.

Ireland: ERA-MORE Ireland was appointed by the Department of Enterprise, Trade and Employment (DETE) to manage the *Hosting Agreement Scheme* following the implementation of the Third-Country Directive on 12 October 2007. Research organisations, public and private, wishing to enter into hosting agreements are first subject to an accreditation process administered by the Office of Science, Technology and Innovation (OSTI). Accredited research organisations draw up individual hosting agreements with each researcher.

Lithuania: All administrative procedures were finalised in 2007 so that the Law of the Republic of Lithuania on the Legal Status of Foreigners complies with Council Directive 2005/71/EC.

Poland: An amendment to the Act on Aliens was prepared in order to implement the Directive 2005/71/EC, featuring the following issues:

- the definitions of scientific research, researcher, research entity; the elements for the approval of the entity wishing to host the researcher, conducted by the Minister for Science (required documents and information, eligible institutions, obligatory publication of approved institutions in the bulletin of the Ministry).
- the provisions for refusing to renew or for withdrawing the approval, provisions and requirements for signing the hosting agreement with the third-country researcher, and the provisions on the expiry of the agreement.

Romania: Since November 2007, the “Scientific Visa” Directive has been fully operational. The national legislation was adapted both via an Amendment to the law on foreign citizens in Romania (Government Emergency Ordinance No 194/12 December 2002) and the Decision of the Minister of Education, Research and Youth on the approval procedure for the hosting agreement (Order No 2414/17 October 2007).

Slovenia: The Directive was transposed before the end of 2007 via the adoption in November of the amendments to the Act on Research and Development, while the Acts on Foreigners and on the Employment of Foreigners had already been amended in 2006.

4.1.3. Prospects

Implementing powers concerning the long-term admission Directive lie with national authorities. The Commission will coordinate with Member States ways of making information on good practices available at national level. As regards the recommendation on short-term visa arrangements, the Commission will improve the exchange of information with and between Member States, including through EURAXESS-Services, with a view to accelerating the implementation of this instrument.

4.2. ERA-Link

4.2.1. At EU level

The ERA-Link initiative aims to network European researchers’ communities active outside Europe, to keep them informed and to enable them to interact, and to build synergies at European level. This is seen as an important part of the strategy to develop an open, competitive and attractive European labour market for researchers, and to encourage “brain circulation” at European and world level.

The ERA-Link initiative (<http://ec.europa.eu/euraxess/links>) was officially launched in the USA in June 2006 by Commissioner Potočník. In 2007, an outreach campaign was launched to expand its membership (peaking at 3 000 persons). Other initiatives include: upgrading the website to provide more information on EU policy initiatives and events and on funding and collaboration opportunities and new services; publishing a periodic newsletter; organising meetings and events across the USA; organising more structured participation in career fairs.

Resources have been identified within the “People” Specific Programme of the 7th Framework Programme to give ERA-Link the support, tools and visibility necessary for its full development in the USA, and to expand the concept to other countries and regions of the world. A first expansion of ERA-Link to Japan was decided in 2007 following the recommendations of a survey conducted among researchers in that country.

Although most of the activities reported by Member States focus on re-integration, it should be emphasised that ERA-Link aims at networking European researchers abroad as an important resource for the ERA, whether they remain abroad or choose to return.

4.2.2. At national level

Germany: GAIN (German Academic International Network) is a joint initiative of the Alexander von Humboldt Foundation (AvH), German Academic Exchange Service (DAAD) and the German Research Association (DFG). The Helmholtz Association of National Research Centres, the Max Planck Society and the University Rectors' Conference joined as associate members. GAIN has established itself as a networking forum for German researchers in North America and as a platform for information exchange across the Atlantic in both directions. GAIN not only assists German researchers in returning to interesting positions in Europe; it also helps to stay in touch with them. Annual meetings of German researchers take place alternately on the west and east coast of the United States and help researchers to establish the necessary contacts with representatives from the field of science as well as from business and industry (www.gain-network.org).

Slovenia: Relationships with Slovene researchers living abroad are of special concern to the Ministry and to several non-governmental institutions. In autumn 2007, a special conference was supported by the Ministry and the Slovenian Science Foundation. It brought together participants from the academic and business spheres to strengthen cooperation with Slovene researchers living in non-European countries.

4.2.3. Prospects

Expansion of the ERA-Link concept to other countries and regions of the world is envisaged, and concrete efforts are already in hand to assess the needs of European researchers in lead expansion countries. The longer-term prospects of the ERA-Link initiative should be assured under the legal basis and with the resources proposed within the "People" specific programme of FP7.

In 2008, priority is due to be given to consolidating ERA-Link in the USA and extending it to Japan, China and other countries and regions of the world. Strategic decisions on further expansion will be supported by the results of a study.

It is also planned to enhance the participation of ERA-Link to job fairs, a privileged mean in the US to encourage the mobility of researchers between institutions which should also be promoted in Europe, in particular in the context of the Researcher's partnership.

5. A MORE EFFICIENT LABOUR MARKET

5.1. Marie Curie Actions

5.1.1. At EU level

With a budget of €440 million in 2007, the "People" Specific Programme of the FP7, which builds on the Marie Curie Actions, continued to cover all stages of a researcher's professional life, from initial research training to life-long learning and career development.

The interest of stakeholders in the “People” Specific Programme is clearly demonstrated by the high number of applications (4054) submitted in 2007.

The Marie Curie fellowships are designed to give European researchers the opportunity to gain experience across Europe and beyond, and to attract top-class researchers from associate or third countries. In 2007, a total of 654 individuals benefited from intra-European (EIF), outgoing (OIF) and incoming international (IIF) fellowships. Beneficiaries considered the Marie Curie fellowship scheme to have a significant impact on mobility: many of them would not have gone abroad had it not been for the fellowship. In addition, 149 researchers who had already benefited from a Marie Curie Fellowship received Marie Curie Reintegration (ERG) and International Reintegration (IRG) fellowships to become professionally reintegrated within their country of origin or in another country. Furthermore, in 2007, 632 research organisations were supported by the Initial Training Networks (ITN) and 165 by Industry-Academia Partnerships and Pathways (IAPP) schemes to provide a platform for training for researchers recruited under a defined collaborative project. Project participants came from Europe, Associated and Third Countries. The high rate of participation of small and medium enterprises is worth noting (12% for ITN and 35% for IAPP).

In addition, a new scheme, Co-funding of Regional, National and International Programmes (COFUND) was launched at the end of 2007 to support trans-national mobility for training and career development of experienced researchers.

Another new scheme, the International Research Staff Exchange Scheme (IRSES), was launched, with a view to strengthening research partnerships through short exchanges between European research organisations and organisations from countries with which the European Union has a science and technology agreement (or is in the process of concluding one) and countries covered by the European Neighbourhood Policy.

5.1.2. At national level

Austria: Special efforts have been made to promote the Marie Curie Industry Academia Pathways and Partnerships (IAPP) scheme. Along with the Austrian Federation of Industry, companies were encouraged to engage in FP7/People on the one hand and enhance intersectoral mobility on the other.

Belgium: A National Contact Points (NCP) network is at the disposal of researchers who plan to submit a proposal for a Marie Curie (or other FP7 related) Action in Belgium or with a Belgian partner.

Czech Republic: Twelve Marie Curie presentations took place at 10 universities throughout the country in 2007. A brochure about Marie Curie activities was published in June 2007, and within 6 months over two thousands copies had been distributed.

Ireland: In August 2007 a consortium of 20 PEOPLE (“Marie Curie”) National Contact Points across Europe coordinated by the Israeli NCP submitted a proposal for funding a European NCP network to the European Commission. The project, called “PeopleNetwork”, was approved for funding. The Irish National Contact Point located at the Irish Universities Association is the leader for a Work package that provides feedback on the administrative and implementation processes, and thus supports the current simplification efforts by the Commission.

Luxembourg: The National Research Fund (FNR) introduced the ATTRACT scheme in 2007, seeking to attract young researchers with an excellent scientific background and with professional experience in research to Luxembourg. The idea is to gradually build up a research team over a period of five years. The programme runs from 2007 to 2010, with one annual call, with funding for one or two projects per call with a duration of five years and a maximum contribution of 1 million EUR. The first project selected in 2007, *Photovoltaics via Electrodeposition of Compound Semiconductor*, is being carried out by a UK citizen at the University of Luxembourg and is receiving 800 000 EUR for 5 years. One innovative aspect of the ATTRACT programme is the funding of a professional business coach by the FNR to support the researcher during the first year, in order to assess and develop management and personal skills.

Norway: In 2007 Norway decided on additional grants to Marie Curie fellows to/from Norway to match the higher level of corresponding research grants in Norway.

Poland: The Ministry of Science and Higher Education launched the second edition of the programme “International mobility of scientists”, aimed at supporting research undertaken by Polish post-docs in research institutions abroad. (see: http://www.nauka.gov.pl/mn/_gALLERY/29/56/29569/20070726_Tekst_ogloszenia_II_edycji.pdf). Also in Poland a number of initiatives have been taken by the Foundation for Polish Science for young scientists: the HOMING Programme (reintegration grants for Polish scientists) (see http://www.fnp.org.pl/ang/programy/homing_more.html); the European Young Investigator Award (EURYI) programme (see also http://www.fnp.org.pl/ang/programy/programy_euryi.html).

Slovakia: The National Scholarship Programme Supporting Mobility of Students, PhD Students, University Teachers and Researchers approved by the Slovak Government reached its implementation phase. In 2007 scholarships to 42 foreign PhD students from 16 countries were awarded. The National Scholarship programme allowed also 115 foreign university teachers and researchers from 34 countries to come to Slovakia to teach/carry out research. In 2007 scholarships to 113 Slovak PhD students were awarded, allowing them to study and conduct research in 25 countries on different continents. The overall funding for scholarships under this programme in 2007 was around 1 million EUR.

5.1.3. Prospects

The Marie Curie Actions will continue to contribute to the quantitative and qualitative development of human R&D potential in Europe, and to encourage mobility to and throughout Europe, with the overall objective of making Europe attractive to the best researchers.

According to the priorities of the new framework programme and on the basis of the higher budget allocated to the People Programme (€4728 million for the whole period 2007-2013, which represents a 50% rise on average compared to FP6) the main objective will be to enhance industry-academia cooperation through increased involvement by industry (including SMEs) throughout the Marie Curie Actions, and to strengthen international cooperation by attracting research talent to Europe. An estimated total of 70 000 researchers should be able to benefit directly from the “Marie-Curie Actions” under FP7.

5.2. Intersectoral mobility between Academia and Industry

5.2.1. At EU level

The Conference organised by the German Presidency in May 2007 (Stuttgart), entitled *European Researchers of Tomorrow: Crossing the Border of Academia and Industry*, underlined the benefits of co-operation between academia and industry. The main objective of the conference was to boost awareness of inter-sectoral research careers. More than 450 people from 28 countries attended the event.

The report *Mobility of Researchers between Academia and Industry: 12 Practical Recommendations*, which is a diagnosis of the challenges and formulates recommendations to tackle them, provided the foundation for the conference, which generated six conclusions: the need for more action and role models with the support of decision-makers to go beyond studies by providing incentives for inter-sectoral mobility and offer concrete opportunities, e.g. via staff exchanges, part-time positions, internships, foster co-location of public and private research to facilitate exchange. These are very likely to lead to further initiatives and innovation.

- (1) Define evaluation criteria which recognise experience and achievements from the other sectors, both when recruiting and evaluating, as recommended by the C&C.
- (2) Implement schemes for industry in order to attract more researchers into regions where R&D expenditure is low and to develop research in industry with no (or very low) research budget, in particular SMEs.
- (3) All researchers, including doctoral candidates to be given adequate social security rights with simple and attractive acquisition and transfer rules. A *'European researchers' pension fund* to be explored as a means of accumulating pension rights.
- (4) "Ownership" is needed! European and national discussion rounds between employers, research investors and researchers would greatly help develop and advance concrete proposals to bridge current gaps of a legal and administrative nature.
- (5) Promote the equal participation of men and women at all career levels, e.g. through programmes supporting female candidates, mentoring, coaching, support for networks and managers responsible for ensuring equal opportunities.

5.2.2. At national level

Finland: Intersectoral mobility is highlighted as a key objective in the Finnish Action Plan for Researcher Education and Researcher Careers 2007-2011, which was adopted by the Minister of Education in January 2007.

France: Law No 2007-148 of 2 February 2007 on the modernisation of the public service seeks to encourage the mobility of civil servants by adapting the rules on secondment. In addition, the law of 10 August 2007 concerning the autonomy and responsibilities of universities made it possible to recruit teachers, researchers and teacher-researchers on a

short-term contract. The objective is to give universities the chance to recruit, for instance, foreign teachers, French researchers active abroad, teachers in foreign languages for a period corresponding to the needs of the establishment. To avoid abuse, the law provides that the multi-annual contract between the State and the university should determine the percentage of the wages which the establishment will be authorised to commit to this type of recruitment.

Italy: Italian Universities are working to improve intersectoral mobility of PhD candidates, fostering relations with professional bodies and enterprises.

An example of such an initiative is the *PhD2business* project, run by the University of Camerino, that consisted in identifying for each PhD candidate keywords of his/her activities and expertise and then using specific software to match the keywords with the profiles of enterprises. On the basis of this matching analysis, a short list of relevant enterprises for each PhD area was established. At present, supervisors and teaching staff are helping candidates in establishing contacts with the selected enterprises with a view to future job collaboration. With the support of the Ministry of Labour (FIxO project) an extensive database was prepared including the *curricula vitae* and expertise of graduates, doctoral candidates and doctorate holders, to be shared with private and public research centres and enterprises in order to promote intersectoral mobility.

Lithuania: In 2007 the Lithuanian Government approved the Concept for Establishment and Development of Integrated Science, Studies and Business Centres (Valleys). Valleys are complex infrastructures that utilise and enhance the strengths of regionally concentrated, sustainable research and innovation networks with clear and long-term commitments by universities, state institutes and companies. During 2007 five evaluation exercises were conducted.

Norway: A national Industrial PhD scheme and a Nordic Private-Public-Partnership (PPP)-PhD scheme were prepared in 2007.

Romania: A funding instrument under the “Human Resources” Programme (2007-2013) aims at improving career perspectives of PhD students, in the frame of a 3-month project, by giving them access to competitive research infrastructures in the country.

Slovenia: The main instrument of the Ministry in 2007 for enhancing intersectoral mobility and interdisciplinarity was the “Young Researchers Programme” and its specific project on “Young Researchers for Industry”.

Spain: Different Ministries (e.g. Education and Science and the Ministry of Industry, Tourism and Commerce, Infrastructures, Environment, Health) took action to foster private R&D and the mobility of researchers. In 2007, there was a steady increase in such actions for all these Ministries. In 2007 the Torres Quevedo Programme, for instance, placed 824 new researchers in companies (700 in 2006), and aims to reach 1300 new contracts a year by 2010.

5.2.3. Prospects

The Green Paper on “the European Research Area: New Perspectives” put inter-sectoral mobility of researchers in the wider context of mobility and career development.

6. THE WAY FORWARD

The Green Paper “the ERA: New Perspectives”³⁴ and its follow up

Reviewing the obstacles to the European Research Area, the Green Paper served as a basis for an intensive consultation process on the six main strands³⁵.

The follow-up discussions on ERA during the Portuguese Conference (Lisbon 9-10 October 2007) were important as they covered possible new initiatives for the mobility and career development of researchers. A consensus emerged at national and European level that a single labour market for researchers should be a top priority.

Finally, the Competitiveness Council of 18/02/2008 adopted a Key Issue Paper³⁶ stressing the need for the Commission and the Member States to take concrete steps to increase human resources for S&T and to enhance the mobility and career prospects for researchers, through a coherent set of measures in partnership.

A European Partnership for Researchers

The Communication “**Better careers and more mobility: a European Partnership for researchers**” adopted on 23 May 2008³⁷ proposes a Partnership between the Commission and the Member States, to jointly drive forward a number of targeted actions in key areas selected for their potential impact at the Community, national and institutional levels. The Competitiveness Council of 26 September 2008 recognised³⁸ that the Partnership constitutes an appropriate approach for strengthening coordination and cooperation at European level and endorsed the priority lines of actions proposed, considering that they constitute a good basis for the development and implementation of the initiatives proposed.

Specifically, the Partnership should make more rapid and measurable progress to:

- systematically open recruitment;
- meet the social security and supplementary pension needs of mobile researchers;
- provide attractive employment and working conditions; and
- enhance the training, skills and experience of researchers.

The effective implementation of this Partnership requires strong commitment on the part of Member States and Associated States and enhanced cooperation between them and with the Commission.

³⁴ COM (2007) 161 final of 4.4.2007.

³⁵ An adequate flow of competent researchers, highly mobile between institutions,/disciplines/sectors; excellent research institutions; effective knowledge sharing; world-class research infrastructures; well-coordinated research programmes and priorities; a wide opening of the European research Area in the world.

³⁶ Doc 16749/07 Compet 443 Rech — Contribution from the Competitiveness Council to the Spring European Council -

³⁷ COM (2008) 317 final; SEC (2008) 1911 ; SEC (2008) 1912.

³⁸ 12854/08.

The Competitiveness Council of 26 September 2008 insisted on the need for a balanced approach complying with both the principles of subsidiarity and autonomy of the research and higher education institutions, and on the need to adapt the mandate of the Steering Group Human Resources and Mobility.

The Council also invited the Commission, in consultation with Member States, to report annually on the progress made, to make a global assessment of actions and results of the Partnership by 2010, and to strengthen Community action, notably within the “People” programme of the 7th Framework programme, so as to respond better to the needs of researchers.

The Partnership should greatly improve the employment situation of researchers.

At the systemic level, it should better balance the supply and demand for researchers, increase transparency on research positions, the possibility of greater mobility between institutions, between the public and private sectors and across borders³⁹, and provide better job opportunities and more rewarding careers. The Partnership could also boost productivity growth through better job matching, increase knowledge transfer and facilitate the development of centres of excellence throughout the ERA, while improving the competitive position of the European research system abroad.

An integral part of the way forward is the Charter & Code, whose principles directly address much of the Partnership objectives. During the Rennes conference in November 2008, a mechanism was launched for implementing the C&C. This mechanism, “The Human Resources Strategy for Researchers Incorporating the C&C”, is designed to be a flexible and simple instrument that builds upon the existing HR strategies in the individual institutions. Broad application of this mechanism by researchers' employers would be a very positive step towards full implementation of the Partnership.

³⁹ As regards mobility of EU researchers within the Community, specific attention has to be given to situations in the scope of free movement of workers provisions, should researchers fall within the definition of migrant worker to EC rules and the case law of the European Court of Justice.