

Annex A: Policy approaches, by country

This annex summarises the information provided by countries in response to the OECD Questionnaire on the International Mobility of Researchers. This information was used to create the summary tables in Chapter 4 of the OECD publication *The Global Competition for Talent*. For Tables 4.2 and 4.6, the Secretariat attempted to categorise policies for presentational and comparative purposes. The categories were as follows:

Table 4.2: Economic Incentives for inflows of HRST:

- Fellowships (F)
- Grants and project funding (G)
- Scholarships and allowances (S)
- Tax benefits and subsidies (T)
- Other (O)

Table 4.6: Policies to facilitate research abroad (outflows of HRST)

- Research grants and scholarships (G)
- Fellowships (F)
- Travel and living support (T)
- Exchange programmes (E)
- Other (O)

These categories are specified next to the policies in the text. For example, under Economic Incentives, Australia's ARC Federation Fellowships are categorised (F). This categorisation is matched by one tick in the Fellowships box.

Australia¹

Economic incentives: There are numerous government administered and supported grants for attracting international or expatriate researchers to Australia. Major programmes include:

- *Australian Research Council (ARC) International Fellowships (F)* – these provide salary and associated funding to outstanding research fellows for a period of up to 12 months to undertake work in Australia. (See www.arc.gov.au/ncgp/lx/lx_default.htm).
- *ARC Federation Fellowships (F)* – designed to retain Australia’s leading researchers and to attract outstanding international researchers, by providing an internationally competitive salary. The “administering organisation” of the fellowship (such as a university) must also provide cash and in-kind contributions equal to that being provided by the ARC. This is a key initiative of the Australian Government’s “Backing Australia’s Ability” funding package. (See www.arc.gov.au/ncgp/fedfellows/ff_default.htm).
- *ARC Discovery Projects* – these aim to support excellent fundamental research by individuals and teams. Four fellowships are available: the *Australian Postdoctoral Fellowship (F)* (for early-career researchers); the *Australian Research Fellowship (F)* and *Queen Elizabeth II Fellowship (F)* (for promising post-doctoral researchers); and the *Australian Professional Fellowship (F)* (for outstanding researchers with proven international reputations). (See www.arc.gov.au/ncgp/dp/dp_default.htm).
- *National Health and Medical Research Council (NHMRC) Australia Fellowship for Health and Medical Research (F)* – this fellowship aims to attract and retain outstanding health and medical researchers across all disciplines. Funding is for five years. (See www.nhmrc.gov.au/fellows/types/granttype/career.htm#2).
- *NHMRC Howard Florey Centenary Fellowships (F)* – these fellowships allow junior (2-5 years post-doctorate) Australian researchers actively engaged in research overseas to return to Australia and continue with a biomedical/health related research career. Funding is for two years, and awards are made every two years.
- *Fulbright awards (F)* – these allow American citizens from all fields to undertake research or study in Australia for 3-12 months.

Immigration:

- Australia’s *General Skilled Migration* programme is designed to target migrants with skills or outstanding abilities that will contribute to the Australian economy. Applicants gain points against a number of criteria, including age, skills, qualifications, English language ability and work experience. Australia gained 726 settlers in 2004-05 who claimed a natural and physical sciences profession (including medical and life scientists). (See www.immi.gov.au/skilled/index.htm).
- The *Temporary Business Long-Stay Visa 457* allows employers to sponsor overseas workers to work in Australia on a temporary basis (3 months to 4 years). The visa is limited to applicants

¹ Note: These responses were correct up to the time of the Australian government elections in late November 2007. As a result of the change of government, there will be changes to Ministries and responsibilities, and some of the website information provided may change over time as might some of the described initiatives.

nominating a trades, professional or managerial occupation. This visa class accounted for more than half the 52 820 skilled visitors arriving in Australia in 2004-05.

- The *Educational Visa 418* enables Australian tertiary institutions, research institutions and schools to sponsor educational workers to fill positions as academics, librarians, technicians, laboratory demonstrators, researchers or teachers, for a period of 3 months to 4 years.
- The *Visiting Academic Visa 419* allows academics from overseas to be involved in research projects in Australia after being invited by an Australian tertiary institution or research organisation. The visa enables a stay of up to 12 months.

Recognition of qualifications: Australia's National Office of Overseas Skills Recognition (AEI-NOOSR) provides a comprehensive range of assessment services to facilitate the recognition of overseas qualifications. These services are not targeted at any particular discipline or level of qualifications or provided *per se* 'to attract foreign researchers and/or HRST'. The assessment guidelines and advice are designed to help decision-makers such as government bodies, employers and educational institutions to make informed decisions for educational, migration and employment purposes. Details are at <http://aei.dest.gov.au/AEI/QualificationsRecognition/Default.htm>.

Through the Department of Education, Science and Training (DEST), Australia participates in the implementation of international recognition arrangements, including the *Lisbon Recognition Convention* and the *Regional Convention on the Recognition of Studies, Diplomas and Degrees in Higher Education in Asia and the Pacific*. These Conventions aim to promote international cooperation to improve mobility for students, researchers, academics and professionals through the recognition of studies and higher education qualifications. Within DEST, AEI-NOOSR acts as the Australian National Information Centre in implementing the Lisbon Recognition Convention.

AEI-NOOSR is primarily concerned with promoting the recognition of overseas postsecondary qualifications in the higher education vocational and technical sectors by:

- Publishing the Country Education Profiles Online, which provide comprehensive information about education systems in over 100 countries, including guidelines on the comparability of overseas qualifications to Australian qualifications;
- Providing information and advice on qualifications recognition to third parties, such as education institutions, government agencies, assessing authorities, employers and professional bodies;
- Providing educational assessment services for individuals with overseas qualifications for general employment and/or educational purposes; and
- Supporting State and Territory agencies responsible for the provision of migrant settlement services.

Social and cultural support: The Australian Government does not provide social and cultural support mechanisms specifically designed for foreign researchers or HRST, although local communities or individual research organisations may run their own initiatives. General services to support migrants and workers coming to Australia include the Adult Migrant English Program (www.immi.gov.au/living-in-australia/help-with-english/learn-english/index.htm), Reciprocal Health Care Agreements with certain countries, Overseas Student Health Cover (www.health.gov.au/internet/wcms/publishing.nsf/Content/health-privatehealth-consumers-oshc.htm) and general information services from the Department of Immigration and Citizenship (www.immi.gov.au).

Research abroad:

- *Australian Research Council (ARC) International Fellowships (F)* (see above) are also available to research fellows for work abroad, under long-term international arrangements, for example with institutions in France, Germany, Israel and South Korea.
- *ARC Linkage International Awards (G)* provide funds for Australia-based researchers to participate in joint research projects with overseas researchers establishing new collaborations, strengthening ongoing collaborations and providing international research experience.
- *ARC Internationally Coordinated Initiatives (ICI) (G)* – the ARC collaborates with overseas funding agencies to fund internationally coordinated collaborative initiatives. The ARC currently has agreements in place for the collaborative funding of research projects with the US National Science Foundation – to stimulate enhanced collaborations among materials science researchers; and the UK Economic and Social Research Council – to foster and support collaborative social science research.
- *ARC Discovery Projects fellowships (4xF)* (see above) are also available for research abroad.
- The *NHMRC CJ Martin Overseas Biomedical Fellowship (F)* provides full-time training overseas and in Australia in basic research within the biomedical sciences. The fellowships are normally awarded to Australian candidates (doctorate holders) for a period of four years, two overseas and two in Australia.
- The *General Sir John Monash Awards (G)* are made to outstanding Australian citizens graduating from Australian Universities to enable them to undertake postgraduate study abroad at appropriate leading universities. Awards favour early career/younger students. (See www.monashawards.org/awards.asp).
- The *International Science Linkages (ISL) Programme (O)* provided by the Department of Education, Science and Training provides support for: Australian researchers to participate in strategically focussed, leading edge, international scientific research and technology collaborations; access to world leading international research facilities, networks and programmes through international exchanges, fellowships, missions and workshops; and Australia's bilateral and multilateral science and technology relations with other governments. (See <https://sciencegrants.dest.gov.au/ISL/Pages/Home.aspx> for details of the components.)
- *Fulbright Awards (F)* allow Australian citizens to undertake research or study in the United States for 3-12 months.
- The Department of Education, Science and Training website provides information on a range of scholarships open to both Australian and international students and researchers. In addition, many universities and organisations involved in education and research provide information on opportunities available both at home and abroad.

Australian mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
ARC International Fellowships		19 awards (2005)	
ARC Federation Fellowships		17 fellowships (2006). Up to 25 available annually.	
ARC Discovery Projects (four fellowship schemes)		167 fellowships (2005)	Preference may be given to Australian citizens and permanent residents. No citizenship requirements for QEII fellowship.
NHMRC Australia Fellowship for Health and Medical Research	AUD 800 000 per year for 5 years	Commenced 2007	Open to Australian and foreign candidates (who must obtain temporary resident status).
NHMRC Howard Florey Centenary Fellowships		8 awards in 2006	Australian citizens or permanent residents
Fulbright awards		28 awards in 2005	United States
Facilitating research abroad:			
ARC International Fellowships		(see above)	
ARC Linkage International Awards		In 2006, round 2 awards funded 14 projects with funding totalling AUD 416 200	
ARC Discovery Projects (four fellowship schemes)		(see above)	
NHMRC CJ Martin Overseas Biomedical Fellowship		32 awards in 2005	Australian citizen or permanent resident.
General Sir John Monash Awards	AUD 4.8 million between 2004 and 2009 plus matching of private and community source funding (AUD 5 million).	Up to 8 awards per year	
International Science Linkages (DEST)	AUD 94.5 million over 5 years from 2002		Australian researchers in international collaborations.
Fulbright Awards	AUD 590 000	19 awards in 2005; 10 were in fields of science, technology, engineering and health or medicine.	Australian citizen

Source: OECD Pilot Questionnaire on the International Mobility of Researchers.

Austria

Economic incentives:

- The programme “*brainpower austria*” (G) offers tailored packages to researchers interested in a career in Austria and to Austrians working abroad who wish to connect to the scientific community at home. Incentives include interview grants (to cover 80% of travel costs to Austria for job interviews), project grants (for travel to complete a project application), and relocation grants (for moving to Austria). Other grants assist researchers to travel to Austria for speaking engagements and to travel to participate in *brainpower austria* events.
- The *Lise Meitner Programme* (G) offers grants to highly qualified scientists of any discipline from abroad, to work in an Austrian research institution for 12-24 months.
- The *Visiting Scientist Programme “Translational Brainpower”* (G) offers grants to internationally recognised researchers to undertake joint research with Austrian researchers, working at least 9 months in Austria and enabling Austrian project workers to undertake research stays at their institution abroad.
- The *L’Oreal Austria Programme* (F) offers fellowships of 6-12 months duration to young female researchers (both doctorate holders and candidates) in the areas of medicine, mathematics and natural sciences, for continuation or preparation of research projects in Austria.

Immigration:

National laws regulating the entry and settlement of foreigners in Austria, as well as national laws regulating the Austrian labour market, contain special (favourable) regulations relating to foreign researchers and HRST and their families. These include:

- no work permit required for foreigners involved in academic activities in teaching and research (from 1 January 2008 the family members of researchers will also not need work permits), and the availability of quota-free residence permits for them and their family;
- facilitated procedures for a quota-free residence permit for researchers employed by a “certified research organisation” which has issued a “hosting agreement” with the researcher;
- quota-free residence permits and no work permits required for “special executives” and their families, as well as certain foreign staff who support the “special executives”;
- one-stop procedures for a settlement permit (with quota) for HRST who meet the requirements of “key personnel” and their family (from 1 January 2008, family members of HRST with settlement permits will enjoy easier access to the Austrian labour market); and
- quota-free settlement permits for students who successfully finish studies in Austria and meet the requirements of “key personnel”.

Recognition of qualifications: The Federal Ministry of Science and Research hosts ENIC-NARIC Austria – a national centre that makes assessments and recommendations for recognition of foreign higher education diplomas (www.enic-naric.net). As well as undertaking approximately 500 assessments annually, the centre regularly organises information workshops, and provides recommendations to institutions on sensitive recognition topics. The centre is part of two European initiatives – the NARIC

(National Academic Recognition Information Centre) network initiative of the European Commission (1984) and the ENIC Network (European Network of National Information Centres on academic recognition and mobility – in order to implement the Convention on the Recognition of Qualifications concerning Higher Education in the European Region (Lisbon 1997)).

Social and cultural support: With participation in ERA-MORE (the European Network of Mobility Centres), Austria hosts two Mobility Centres (see www.oead.at and www.ffg.at) and 33 Local Service Centres (details accessible at www.researchinaustria.info/mobility_centres_map.htm). Mobility Centres provide information and assistance in matters such as entry conditions, visas, work permits, recognition of diplomas, job opportunities, salaries, taxation, pension rights, health care, social security, accommodation, day care, schooling, language courses, access to the culture of the host country and IPR. Non-targeted social and cultural support for foreigners is provided at the community, federal state and university level, with further information available on the Researcher's Mobility Portal Austria (www.researchinaustria.info).

Research abroad:

- The *Erwin Schrödinger Auslands-stipendium* (F) provides fellowships to young researchers of any discipline to undertake scientific work at leading foreign research institutions for 12-24 months. Researchers must have been based in Austria for at least 3 of the previous 10 years to qualify for the fellowships.
- The *APART* programme (F) (Austrian Programme in Advanced Research and Technology) provides fellowships for young doctorate holders to carry out research projects in Austria and abroad.
- The *DOC Programme* (F) (Doctoral Programme of the Austrian Academy of Sciences) offers fellowships of 1-3 years to young doctoral candidates to undertake their PhD in Austria and abroad.
- The *DOC-fFORTE* (F) (Women in Science and Technology) Programme offers fellowships to young female doctoral candidates from natural and life sciences, technical sciences, mathematics, and medicine to undertake their PhD in Austria and abroad.
- The *DOC-team Programme* (F) offers fellowships for young doctoral candidates in humanities and social sciences to undertake their PhD in Austria, including a research stay abroad for at least 6 months.
- The *MAX-KADE Programme* (F) provides fellowships for young doctorate holders from medicine and the natural and technical sciences to carry out research projects in the United States for one year.

Austrian mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
Brainpower Austria	€200 000 (2007)	130 applications, 112 funded (2006)	Open to all registered users of brainpower austria who live and work abroad. Applicants for speakers grants must have once lived in Austria for a period of at least 3 years.
Lise Meitner Programme	€2.1 million (2006)	25 grants awarded (2006)	
Visiting Scientist Programme "Translational Brainpower"	€1.2 million (2007)		
L'Oreal Austria (Fellowships for Young Female Researchers)	€60 000	2-4 fellowships per year (€15 000 each)	Open to Austrian citizens or those living in Austria for at least 3 years.
ENIC-NARIC Austria	Part of Ministerial public budget	Approx. 500 assessments per year	
ERA-MORE Mobility centres		Providing information and assistance to mobile researchers	
Facilitating research abroad:			
Erwin Schrödinger Auslands-stipendium	€3.0 million (2006)	57 fellowships awarded (2006)	Open to applicants who have been based in Austria for at least 3 of the previous 10 years.
APART	€1.817 million	8-10 fellowships per year (€50 000 each per year)	Open to Austrian citizens or those living in Austria for at least 2 years.
DOC	€1.817 million	15-20 fellowships per year (€30 000 each per year)	Open to Austrian citizens or those living in Austria for at least 2 years.
DOC-fFORTE	€990 000	20-25 fellowships per year (€30 000 each per year)	Open to Austrian citizens or those living in Austria for at least 2 years.
DOC-team	€900 000	3-4 teams per year (€28 000 per person per year)	Open to Austrian citizens or those living in Austria for at least 2 years.
MAX-KADE	€350 000	8 fellowships per year (USD 40 500 each per year)	Open to Austrian citizens or those living in Austria for at least 2 years.

Source: OECD Questionnaire on the International Mobility of Researchers.

Belgium

Belgium is a federal state comprising three regions and three communities, as well as a federal authority. The various empowered entities put emphasis on their own priorities and offer their own selection of mobility programmes and policies (identified below).

Economic incentives:

- The *Research in Brussels grant programme (G)* (offered by the Institute for the encouragement of Scientific Research and Innovation – Brussels) aims to attract skilled foreign researchers to conduct research with a specific interest for the region, for a duration of up to 12 months. A new “return programme” is also due to be started in the Brussels-Capital region in 2008. (See www.irsib.irisnet.be/).
- The *Odysseus programme (G)* (offered by Research Foundation Flanders – FWO) offers grants to top scientists to enable them to establish an independent research team at a Flemish university. Both internationally recognised researchers with an established foreign career (group 1) and researchers with the potential to become internationally recognised (group 2) may apply. Funding is for 5 years, with group 1 recipients allocated €400 000 to €1.5 million per year and group 2 recipients allocated €100 000 to €200 000 per year. (See www.fwo.be/en/FWOAppOdysseus.aspx).
- *Visiting Postdoctoral Fellowships (F)* (offered by Research Foundation Flanders – FWO) are available to foreign postdoctoral scientists who bring in expertise to support existing FWO projects and Scientific Research Networks. Junior fellowships are available for recent PhDs, while senior fellowships are available for established researchers (recipients of PhDs within past 5-10 years). Funding is for 3 to 12 months. (See www.fwo.be).
- The *Echanges internationaux dans le cadre d'accords spécifiques (O)* (offered by Fonds de la Recherche Scientifique – FNRS – French Community of Belgium) are available to postdoctoral researchers of the French Community of Belgium and to foreign postdoctoral researchers in the framework of scientific agreements with specific countries: Argentina, Brazil, Czech Republic, China, Great-Britain, Hungary, Japan, Korea, Luxemburg, Mexico, Poland, Taiwan and United States of America. Funding is for 1 week to maximum 1 year. (See www.frs-fnrs.be).
- The *Mandat de chercheur post-doctoral (G)* (offered by Fonds de la Recherche Scientifique – FNRS – French Community) provides a grant (up to €35 000 per year) to young foreign researchers who have been invited to participate in research funded by the FNRS or one of its associated funds, for a maximum of 3 years. (See www.fnrs.be).
- The *Bourses de séjour scientifique (S)* (offered by F.R.S. – FNRS – French Community of Belgium) provide funding for foreign researchers to visit institutions financed by the FNRS or one of its associated funds, for 1 to 3 months. (See www2.frs-fnrs.be/).
- The *Missions scientifiques (S)* (offered by F.R.S. – FNRS – French Community of Belgium) funds foreign professors to visit a university in the French Community in Belgium for a maximum of 12 months. Funding of € 500 per month is offered. (See www2.frs-fnrs.be/).
- *Postdoctoral Fellowships to Non-EU Researchers (F)* (offered by the Federal Science Policy Office) provide funding for highly qualified researchers (postdoctoral or equivalent experience) from specific regions to work in Belgian research teams for 6-12 months. The potential Belgian

host units are those involved in the research programmes and actions of the Federal Science Policy Office. The fellowships include a monthly allowance (€1 800), one-off travel expenses (€900), personal liability insurance costs, and a contribution to the National Office of Social Security. (See www.belspo.be/belspo/home/calls/postdoc_en.stm).

- *Return Grants (F)* (offered by the Federal Science Policy Office) aim to promote the reintegration of highly qualified Belgian researchers (doctors or equivalent) who have been working abroad for at least 2 years. The grants fund a 2-year fellowship.

Immigration: A *scientific visa* is offered to third-country researchers visiting Belgium, following the transposition of European Commission Directive 2005/71. The visa is essentially a residence permit for researchers who have signed a “hosting agreement” with an accredited research organisation. Work permits are not required and the immigration authorities process the residence permit rapidly on the basis of the hosting agreement.

Recognition of qualifications:

Social and cultural support: The Belgian network of mobility centres, part of the European ERA-MORE network, has operated since 2004. Each Mobility Centre (there are 20 nation-wide) can help researchers with issues related to visas, work permits, salaries and taxation, social security, pension rights and healthcare, accommodation, recognition of qualifications and diploma, day care and schooling, language courses, and so on. (See www.eracareers-belgium.be/mercator/index.asp).

Research abroad:

- The *Bourses de séjour scientifique (G)* and the *Missions scientifiques (G)* (offered by FNRS – French Community) discussed above also provide funding for researchers to spend 1-3 months, or 12 months, abroad, respectively. The *Missions scientifiques* allow professors of the French Community of Belgium to momentarily stop their pedagogical activities to undertake research abroad and/or to synthesise their research, with funding of €100 per month. (See www2.frs-fnrs.be/).
- The *Mobility Allowance for FWO-postdoctoral fellows (T)* (offered by the Research Foundation Flanders) provides an allowance for postdoctoral fellows to spend one year at another host institution. The allowance consists of a fixed amount covering travel and accommodation expenses of the researcher and their family. The loss of spouse salary due to a long term sojourn abroad may also be compensated.
- The Research Foundation Flanders offers *travel grants (T)* for conferences, short stays abroad (4-6 weeks) and long stays abroad (up to 10 months), to researchers associated with a Flemish university or research institution. Preference is given to young researchers. Travel grants for conferences cover travel costs, while travel grants for short and long stays consist of a fixed contribution to the costs of the stay (€60/day or €1 500/month) in addition to travel costs. Grants are also provided for stays abroad in the framework of bilateral agreements between Research Foundation – Flanders and associated organisations abroad. “Joint projects”, co-funded by FWO and foreign organisations, also exist.
- The Fonds de la Recherche Scientifique – FNRS has signed, with the CGRI (Commissariat Général aux Relations Internationales de la Communauté française de Belgique), *co-operation agreements providing exchange of researchers (E)* with Bulgaria, France, Hungary, Italy, Morocco, Romania and Slovakia. The FWO-Vlaanderen has signed bilateral co-operation

agreements with the following countries: Argentina, Brazil, Bulgaria, China, Czech Republic, Hungary, Japan, Korea, Mexico, Poland, Romania, Russia, Slovakia, Slovenia, the United Kingdom, and the United States.

- The F.R.S. – FNRS (French Community) offers *Crédits pour brefs séjours à l'étranger* (T), which allow highly qualified researchers to make a visit abroad for a maximum of 2 months. The crédits cover travel costs and a daily contribution of €50 (to a maximum of € 500).
- The *Réunion scientifique à l'étranger* (T) (offered by the F.R.S. – FNRS – French Community) covers transport costs for researchers to attend meetings abroad organised by recognised scientific entities.

Other policies:

- Under a new distributive code of higher education funds (commencing in 2007), the Flemish government will allocate a percentage of the total government contribution to universities and institutes for higher education on the basis of a diversity coefficient – that is, the share in personnel of women or of persons who took their doctoral degree at a different university or who worked at a different university for several years. In 2007 the diversity coefficient made up 2% of the total amount of subsidies allocated by the Special Research Foundation – this will rise to 4.2% by 2009.
- The Flemish Government is funding a 5-year project named *The Policy Research Centre for R&D Indicators (2007-2011)*, which will provide R&D indicators on research output and research potential, as well as carry out scientific research in each of these fields. One partner in this inter-university project – Ghent University – focuses on Human Resources in Research (doctorates, doctoral careers and researchers' mobility). Ghent University will generate indicators on the production of doctorate degrees and the mobility flow of international researchers in Flanders, as well as provide insights into academic and non-academic career opportunities to PhD graduates.
- In the course of 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 Minister visited several universities, where each time she met approximately fifty researchers in various stages of their career, to exchange thoughts. The European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers were used as the conceptual framework for setting up a dialogue. One of the three major themes discussed was international mobility as a means for knowledge transfer. The minister explained the new policy measures, but mostly listened to the concerns of the Flemish researchers. The outcome of the dialogue sessions will be used to set out an action plan for researchers' careers, in which international mobility will be one of the focus points.

Belgian mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
Research in Brussels (Brussels)		206 grants since 1990	
Odysseus (Flanders)	€12 million annually	One fellow appointed in 2006. 16 recipients in 2007.	
Visiting Postdoctoral Fellowships (Flanders)		28 recipients in 2006	
Mandat de chercheur post-doctoral (French Comm.)			
Échanges internationaux dans le cadre d'accords spécifiques	€29 870 in 2006 €38 246 in 2007	21 recipients in 2006 25 recipients in 2007	Argentina, Brazil, Czech Republic, Hungary, Korea, Poland.
Bourses de séjour scientifique (French Comm.)			
Missions scientifiques (French Community of Belgium)	€165 000 in 2006-07	39 recipients in 2006-07	Australia, Bulgaria, Canada, France, Georgia, Germany, Great-Britain, India, Israel, Italy, Japan, Mexico, Poland, Spain, Russia, Switzerland, US.
Postdoctoral Fellowships to Non-EU Researchers (Federal)	€800 000 annually		Non-EU Eastern Europe (however, Bulgaria and Romania considered for 2007 selection); Caucasia and Central Asia; Egypt, Jordan, Morocco, Tunisia, Turkey; Burundi, Congo, Rwanda; South Africa; Latin America.
Return Grants (Federal)	€1.24 million annually		Belgian post-docs who have been working abroad for at least 2 years.
Mobility Centres			
Facilitating research abroad:			
Bourses de séjour scientifique (French Comm.)			
Missions scientifiques (French Comm.)			
Mobility Allowance for FWO-postdoctoral fellows (Flanders)		31 awards in 2006	
Travel grants (Flanders)		Short stay abroad: 107 in 2006 Long stay abroad: 89 in 2006 Workshop/summer school: 35 in 2006	Pre-doctoral applicants must have Belgian nationality, belong to a member of the EU or EEA, or have a degree issued by an EU or EEA member country.
Crédits pour brefs séjours à l'étranger (French Comm.)			
Réunion scientifique à l'étranger (French Comm.)			

Source: OECD Questionnaire on the International Mobility of Researchers.

Canada

Economic incentives: The *Canada Research Chairs Program (G)* stands at the centre of the Canadian Government's strategy of investing in skilled workers, research, science and innovation. The program was launched in 2000, with a view to establishing 2000 research professorships in universities across the country by 2008. It is designed to strengthen Canada's research capacity and offset "brain-drain" pressures by helping Canadian universities and their research affiliates retain and attract the best researchers to Canada. Chairholders advance the frontiers of knowledge in their fields, not only through their own work, but also by teaching and supervising students and co-ordinating the work of other researchers.

The program allows eligible Canadian degree-granting institutions the opportunity to nominate outstanding researchers for senior professorships in areas that will further the institution's overall research priorities and enable them to maximize their contributions as centres of research and research training. Each institution is allocated a certain number and type of Chairs for which it can nominate researchers. There are two types of Chairs:

- Tier 1 Chairs, tenable for seven years and renewable, are for outstanding researchers (professors, associate professors or equivalent) acknowledged by their peers as world leaders in their fields. For each Tier 1 Chair, the university receives CAD 200 000 annually for seven years.
- Tier 2 Chairs, tenable for five years and renewable once, are for exceptional emerging researchers (assistant or associate professors or equivalent), acknowledged by their peers as having the potential to lead in their field. For each Tier 2 Chair, the university receives CAD 100 000 annually for five years.

Chairs are awarded to individual researchers who take up the Chair on a full-time basis. It should be noted that Canada Research Chairs are institutional awards, not individual awards. (See www.chairs.gc.ca/web/home_e.asp).

Chairholders are also eligible for *infrastructure support from the Canada Foundation for Innovation (CFI)*, to help acquire state-of-the-art equipment essential to their work. Each eligible university has a maximum allocation (CAD 125 000 per Chair) to be used for infrastructure needs associated with the first 2000 appointments to the program, with the CFI funding this on a cost-shared basis: 40% of the eligible costs of a project coming from the CFI and 60% coming from universities and their funding partners.

Other programs facilitating inward mobility include:

- The *Canadian Institutes of Health Research (CIHR) International Scientific Exchanges: Multiple Countries (G)* grant program. The CIHR has Memorandums of Understanding (MoU) with institutes in Argentina, Brazil, China, France and Italy. Each MoU provides that each agency should make available to the other an annual quota of a specific number of research-months. Foreign scientists visiting Canada will receive a living allowance from CIHR and a travel allowance from their country's agency. (See www.cihr-irsc.gc.ca/e/22391.html).
- The *CIHR Collaborative Research (China-Canada) (G)* program aims to promote the development of Canadian-Chinese scientific co-operation between universities, hospitals, research institutes or affiliated research organizations in Canada and China through the support of collaborative research grants. The grants make a contribution towards expenditures directly related to the research project and international travel for exchange visits (less than 6 months) that are an essential part of the collaborative project. (See www.cihr-irsc.gc.ca/e/32848.html).

- The *CIHR Other Training Award: Canada-HOPE (Health in Developing Countries)* (G) is currently aimed at India, Pakistan, Bangladesh, Sri Lanka and Nepal. The short term goal is to enable promising individuals to be mentored by prominent Canadian researchers. The long term objective of the program is to enable promising scientists and clinicians from Low and Middle Income Countries (LMIC), as identified by the Canadian International Development Agency (CIDA) and the United Nations (UN), to be exposed to some of the best science, laboratories and training environments in Canada. (See www.cihr-irsc.gc.ca/e/28943.html).
- The *CIHR Other Training Award: Research on Ageing (USA-Canada)* (F) enables researchers from the United States to undertake research in Canada on the subject of ageing. The fellowships are the result of a collaboration between the Institute of Aging of the Canadian Institutes of Health Research and the National Institute on Aging of the National Institutes of Health (CIHR-IA and NIH-NIA). Each institution will invest resources to enhance the scope of research training and to further the role of Canada and the United States in enhancing research capacity in the field of aging. (See www.cihr-irsc.gc.ca/e/31570.html).
- The Social Sciences and Humanities Research Council of Canada (SSHRC) also allows the hiring of foreign research assistants and international researchers are eligible to apply as co-applicants to selected SSHRC programs and as research collaborators to any SSHRC-supported project (O).

Immigration:

- For researchers entering under the Canada Research Chairs Program, the Department of Human Resources and Skills Development Canada (HRSDC) has allowed the issue of *work permits* exempt from the usual requirement to obtain a Labour Market Opinion.
- The *Off-Campus Work Permit program* is to be piloted in 75 private institutions, allowing students of these institutions to hold jobs outside of the campus on which they are studying. This program is already available to students at publicly funded universities and colleges. (See www.cic.gc.ca/english/study/work-offcampus.asp).
- Canada also operates a *skilled migrant scheme*, which assesses applicants on the basis of six selection criteria and a points system. (See www.cic.gc.ca/english/index.asp).

Recognition of qualifications:

- The Department of Human Resources and Skills Development Canada (HRSDC) is implementing the Government of Canada's *Foreign Credentials Recognition (FCR) Program*. This initiative will involve working with provinces, territories, regulatory bodies and sector councils to foster fairer and more transparent credential recognition processes for skilled immigrants in targeted occupations and sectors, thus ensuring that Canadian employers have access to a large pool of talented workers. (See www.hrsdc.gc.ca/en/workplaceskills/credential_recognition/index.shtml).
- The *Canadian Information Centre for International Credentials (CICIC)* was established after Canada ratified the UNESCO Convention on the Recognition of Studies, Diplomas and Degrees concerning Higher Education in the States belonging to the Europe Region, in 1990, to assist Canada in carrying out its obligations under the terms of this convention. The convention promotes international mobility by advocating wider recognition of higher education and professional qualifications. The Centre is an information and referral office and is also a member

of the network of European National Information Centres (ENIC). (See www.cicic.ca/en/index.aspx).

Social and cultural support:

Research abroad:

- The *Canadian Institutes of Health Research (CIHR) International Scientific Exchanges: Multiple Countries (G)* grant program (described above) also facilitates research abroad. Canadian scientists visiting the foreign country agency will receive a living allowance from that agency and a travel allowance from the Canadian Institutes of Health Research to cover return economy airfare between their city of residence in Canada and the city in which the host laboratory is located.
- The *CIHR Collaborative Research (China-Canada) (G)* program (described above) also enables researchers to travel to China.
- The *Japan Society for the Promotion of Science Invitation Fellowship Programs (F)* (overseen by the Natural Sciences and Engineering Research Council of Canada – NSERC) allow scientists employed at Japanese universities/research institutions to invite fellow researchers from other countries to Japan to participate in cooperative activities. These programs presuppose the existence of contacts between scientists in Japan and in other countries, a condition considered favourable to the promotion of future scientific cooperation and exchange. NSERC is responsible for selecting Canadian nominees for these fellowships. (See www.nserc.gc.ca/professors_e.asp?nav=profnav&lbi=e3).
- The *CIHR Other Training Award: Summer Program in Japan (O)* provides opportunities for young pre- and post-doctoral researchers from Canada to receive an orientation on Japanese culture and research systems and to pursue research under the guidance of host researchers at Japanese universities and research institutes over a period of approximately eight weeks during the summer (from late June through late August). (See www.cihr-irsc.gc.ca/e/25076.html).
- The *Social Sciences and Humanities Research Council of Canada (SSHRC) International Opportunities Fund (G)* offers Development Grants and Project Grants to help Canadian researchers to initiate and develop international research collaborations; and to facilitate Canadian participation or leadership in current or planned international research initiatives that offer outstanding opportunities to advance Canadian research. (See www.sshrc.ca/web/apply/program_descriptions/iof_e.asp).
- Federal Research Granting Councils allow students to hold their scholarships/fellowships abroad (with the exception of the Canada Graduate Scholarships program) (F).

Other policies:

- The Government of Canada offers an *on-line guide to funding*, to serve as a resource for Canadian researchers and scientists. The mission of the guide is to encourage, facilitate, and promote basic and applied research. It is divided into three sections: grants and bursaries; post-doctoral fellowships; and major international prizes. (See <http://fgic-gfci.scitech.gc.ca/>).
- The *International Academic Mobility Initiative (IAM)* supports Canadian post secondary institutions in offering international learning opportunities to their students. This goal is achieved

through IAM's support for student mobility and academic co-operation projects between Canadian post-secondary institutions and institutions in foreign partnering countries. There are two programs:

- The Canada-European Community Program for Co-operation in Higher Education and Training: encourages joint academic projects among higher education institutions, training establishments and other organizations on both sides of the Atlantic.
- Program for North American Mobility in Higher Education: encourages co-operation in higher education and training among the three North American Free Trade Agreement countries with a focus on student mobility. Since its inception, universities and colleges from all regions of Canada have participated in a wide range of trilateral projects with institutions in the United States and Mexico. The trilateral partnership activities include the innovative use of new learning technologies to maximize student participation.

Canadian mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
Canada Research Chairs Program	CAD 300 million per year	Total number of Chairs 1755 (as of December 2006). Tier 1: 800 Tier 2: 955	
CFI Infrastructure Support	Up to CAD 250 million committed for first 2000 Chairs.		
Canadian Institutes of Health Research (CIHR) International Scientific Exchanges: Multiple Countries			
CIHR Collaborative Research (China-Canada)			
CIHR Other Training Award: Canada-HOPE (Health in Developing Countries)			
CIHR Other Training Award: Research on Ageing (USA-Canada)			
Foreign Credential Recognition (FCR)			
Canadian Information Centre for International Credentials (CICIC)			
Facilitating research abroad:			
Canadian Institutes of Health Research (CIHR) International Scientific Exchanges: Multiple Countries			
CIHR Collaborative Research (China-Canada)			
Japan Society for the Promotion of Science Invitation Fellowship Programs			
CIHR Other Training Award: Summer Program in Japan			
Social Sciences and Humanities Research Council of Canada (SSHRC) International Opportunities Fund			

Source: OECD Pilot Questionnaire on the International Mobility of Researchers.

Czech Republic

Economic incentives:

Immigration: The *Open Chance* programme (2003-2008) aims to gain skilled workers for the Czech labour market, to help change the age structure of Czech researchers (currently with a peak in the category of 50-60 years of age). It facilitates permanent residency procedures for foreign graduates of Czech universities (except graduates who studied in the Czech Republic as part of a development assistance project) and for citizens from certain countries, who have found employment in the Czech Republic. The Czech Republic is also transposing European Council Directive 2005/71 on specific procedures for admitting third-country nationals for the purpose of specific research. This should take effect from October 2007.

Recognition of qualifications: Since 2000, the Czech Republic has operated a NARIC centre that evaluates diplomas and other documentation on education gained abroad (www.naric.cz). The centre is part of the NARIC network co-ordinated by the European Commission. As well as assessment, the centre offers information and consultations on the higher education system in the Czech Republic.

Social and cultural support: As part of the European network of mobility centres (ERA-MORE), the Czech Republic hosts a mobility centre in Prague, as well as eight regional cooperating points, that provide assistance with entry, living and working conditions for foreign researchers coming to work in the Czech Republic. This is complemented by a Researcher's Mobility Portal at www.era Careers.cz. The Czech Republic also provides non-targeted support, via grants, to NGOs that provide language courses, and legal, social and cultural support to foreigners legally settled in the Czech Republic.

Research abroad:

- As part of the *Education for Competitiveness* Operational Programme (see below), the Czech Republic encourages further education of university employees through engagement in international projects and networks (O).
- The KONTAKT programme (G) facilitates mobility in the framework of bilateral research projects to 13 countries that have signed agreements of bilateral co-operation with the Czech Republic.
- The Czech Republic is a member of the Visegrad Group (members are Czech Republic, Hungary, Poland and Slovakia), which provides scholarships under the *International Visegrad Fund* (G) to outstanding students from the Visegrad countries to study at acknowledged universities abroad.
- The Czech Republic also has access to the Fulbright Fellowship Program (F), which supports studying, teaching and researching in the United States.

Other policies: The *Education for Competitiveness* Operational Programme is a broad policy, funded partially with European funds, that supports Czech research teams in R&D. Some of its aims lay the groundwork for future mobility, for example, one aim is to prepare individuals and teams for involvement in international networks and projects.

Czech mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
Open Chance	€3.3 million for period 2002-08	530 participants (as at 31 December 2006)	Citizens of Belarus, Bosnia and Herzegovina, Croatia, Canada, India, Kazakhstan, Macedonia, Moldova, Monte Negro, Russian Federation, Serbia and Ukraine. No restrictions on country of origin for graduates of Czech universities.
NARIC			
Mobility Centres	Financial support by Ministry of Education, Youth and Sports 2005-08; total budget €61 620	Network of regional cooperating points (8)	
Support from NGOs – integration of foreigners	€370 000 per year	20 projects per year	
Facilitating research abroad:			
Education for Competitiveness	Total budget for total programme duration €2.131 million (2007-2013)	In total, 250 projects planned	Eligibility restricted to Czech research institutions
KONTAKT	€700 000 per year	Approx. 60 projects per year	Belgium, France, Italy, Hungary, Poland, Austria, Greece, Germany, China, Japan, Korea, Russian Federation, United States.
International Visegrad Fund	Total budget for 2007 is €5 million (each country – Czech Republic, Hungary, Poland, Slovak republic – contributes €1.2 million per year).		Intra-Visegrad Scholarships and Out-going Scholarships for study at universities in Albania, Belarus, Bosnia and Herzegovina, Croatia, Czech Republic, Hungary, Macedonia, Moldova, Montenegro, Poland, Serbia, Slovakia and Ukraine.

Source: OECD Questionnaire on the International Mobility of Researchers.

Finland

Economic incentives: The *Finland Distinguished Professor Programme* (FiDiPro) (G) provides funding for research projects in Finland that recruit highly merited international researchers (foreign or expatriate Finns) for a period of 2-5 years (www.fidipro.fi). The Finnish Government also advises that tax benefits are available to teachers and researchers in higher education institutions, under temporary legislation (T).

Immigration: No formal arrangements exist; however, good co-operation between the Directorate of Immigration and higher education institutions means that applications of foreign researchers are treated 'urgent'.

Recognition of qualifications: The Finnish National Board of Education is responsible for the recognition and comparability of foreign qualifications for civil service posts and positions in Finland (www.oph.fi). It acts as the Finnish contact point for the European ENIC-NARIC network.

Social and cultural support: No targeted programme exists, but a large variety of community support is available, as well as support from higher education institutions. A large amount of information is available on the Researcher's Mobility Portal Finland (accessed via www.aka.fi).

Research abroad: Most of the research grants offered by the Academy of Finland and the Finnish Funding Agency for Technology and Innovation (Tekes) include the opportunity to receive research and travel funding for research abroad (2xG,2xT) (see www.aka.fi and www.tekes.fi).

Finnish mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
FiDiPro	€17.5 million (initial round of funding)	24 research projects (with 24 professors commencing work in Finland in 2007)	
Tax benefits			
Finnish National Board of Education (Finnish ENIC-NARIC)			
Facilitating research abroad:			
Academy of Finland grants			
Tekes grants			

Source: OECD Questionnaire on the International Mobility of Researchers.

Japan

Economic incentives:

- The *Asia Science and Technology Strategic Cooperation Program* (Special Coordination Funds for Promoting Science and Technology) (**G**) encourages networking between Japanese and Asian researchers through a series of international symposium and joint projects (involving researcher exchanges) for solving the “Asian Regional Common Agenda”. The programme offers funding for 3-5 years.
- The *Postdoctoral Fellowship for Foreign Researchers* (**F**) aims to assist highly qualified young foreign researchers who hold a doctoral degree to pursue collaborative research under the leadership of a host researcher in a Japanese university or research institute. Fellowships are for 1-2 years, and the scheme is considered a central policy to facilitate activities of foreign researchers in Japan, as required by Japan’s 3rd Science and Technology Basic Plan. (See www.jsps.go.jp/english/e-fellow/postdoctoral.html#long.)
- The *Postdoctoral Fellowship (short-term) for North American and European Researchers* (**F**) aims to assist highly qualified young pre- and post-doctoral foreign researchers from the US, Canada and European countries to pursue collaborative research under the leadership of a host researcher in a Japanese university or research institute. Fellowships are for 1-12 months. Citizens from other countries are eligible if they have completed a masters or PhD course plus at least 3 years of research at an institution in one of the eligible countries. (See www.jsps.go.jp/english/e-fellow/postdoctoral.html#short.)
- The *Invitation Fellowship Programmes for Research in Japan: Short-term* (**F**) allow researchers employed at designated Japanese research institutes and laboratories to invite fellow researchers from other countries to Japan to participate in co-operative activities, for a duration of 14-60 days. The scheme aims at senior scientists, university professors and other persons with substantial professional experience. (See www.jsps.go.jp/english/e-inv/short_set.htm). There is also a longer version of the scheme – *Invitation Fellowship Programmes for Research in Japan: Long-term* (**F**) – which offers funding for 2-10 months for researchers to visit Japan. This long-term scheme is aimed at researchers with a background equivalent to that of a professor, assistant professor or research associate in a Japanese university. (See www.jsps.go.jp/english/e-inv/long_set.htm.)
- The *Strategic International Cooperative program* (**O**) offered by the Japan Science and Technology Agency promotes international exchanges between researchers in specific research areas based on a series of bilateral or multilateral governmental agreements (determined by the Ministry of Education, Culture, Sports, Science and Technology – MEXT). It supports the exchange of researchers and holding of meetings such as symposiums and seminars.

Other more generic programmes to encourage inflows of skilled people include:

- The *Japanese Government Scholarship System* (**S**) – this aims to promote mutual understanding between Japan and foreign countries and build strong human networks. In addition, universities offering internationally appealing programs (as selected by MEXT) may accept international students under the *International Priority Graduate Programs (PGP)*, which are given priority for scholarships. Over 60 programs from 32 universities are eligible.

- *Honour Scholarships (S)* for privately financed students with outstanding performance who are having difficulty in pursuing their studies for financial reasons. Scholarships are given for 1 year and are also available to students at Japanese language schools who are intending to enter a higher education institution.
- The *Short-term Student Exchange (In-bound) Promotion (S)* program allows students enrolled in a foreign university to be admitted to a Japanese university for short-term study (3 months to 1 year) under the provisions of inter-university exchange agreements. Funding is provided via a monthly stipend and a one-off relocation allowance. (See www.jasso.go.jp/scholarship/short_term_e.html).

Immigration:

- Foreign researchers who are employed in enterprises located in the “Special Zones for Structural Reform” receive *preferential treatment* in their applications for a residence permit, and a certain category of researchers may also apply for the status of *Permanent Resident* after 3 years (rather than 5-10 years).
- Researchers and scholars entering for short stays may receive a *multiple-entry visa*, valid for 1-3 years (usually only single-entry visas are issued). This programme was introduced in 1996 for 16 countries, and now covers most countries.
- The maximum term of residence granted for activities related to research, guidance of research, education in specific fields requiring sophisticated expertise, and information-processing related services, at designated facilities, has been extended from 3 to 5 years.
- The APEC Business Travel Card (ABTC) allows passport holders of participating economies to visit APEC economies with passports and ABTC, without visa requirements. Seventeen economies participate and over 1300 Japanese businesspeople now have ABTC (as of end-June 2006).

Recognition of qualifications:

Social and cultural support: Some support offered via the *Strategic Fund for Establishing International Headquarters in Universities* (see below).

Research abroad:

- The *Postdoctoral Fellowships for Research Abroad (F)* provide opportunities for young Japanese researchers to experience foreign research environments and promote collaboration in scientific activities, for a duration of 2 years. This program is considered central to encouraging Japanese researchers to work abroad, as required by the 3rd Science and Technology Basic Plan.
- The *International Training Programme (O)* will provide overseas research and education opportunities for young Japanese researchers. Ten universities will be selected from 61 interested Japanese universities to receive funding (as of August 2007). Funding will be provided for 5 years.

Other more general policies assisting mobility abroad include the *Japanese Government Sponsored Dispatch Abroad (G)* system (offered by MEXT), which sends Japanese students to overseas graduate schools to obtain master/doctoral degrees (for a duration of 2-3 years). Recipients must be willing to

remain at the university or other research institution after the completion of their study and to engage in educational and research activities that would enhance Japan's international competitiveness and make intellectual contributions to society. Another policy is the *Short-term Students Exchange Promotion Program (dispatch)* (E) (offered by the Japan Student Services Association – JASSO), which allows students enrolled at a Japanese university to be admitted to a foreign university for short-term study (3 months to 1 year), under the provisions of inter-university exchange agreements.

Other policies: The MEXT and Japan Society for the Promotion of Science (JSPS) have selected 20 universities to take part in the programme *Strategic Fund for Establishing International Headquarters in Universities*. These headquarters aim to support university-wide international activities with co-ordination among various organisations in the university. Funding is provided for 5 years (2005-2009), with evaluation of progress in the third year of the project. The program aims to include some social and cultural support for foreign researchers and also to expand overseas research opportunities for researchers.

Japanese mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
Asia Science and Technology Strategic Cooperation Program	¥0.5 billion (from 2006)	From 2006, a series of symposium and 10 joint projects.	Asia
Postdoctoral Fellowship for Foreign Researchers	¥5.7 billion (2006)	1669 awards in 2006	
Postdoctoral Fellowship (short-term) for North American and European Researchers	¥4.5 million (2006)	126 recipients in 2006	North America and Europe
Invitation Fellowship Programmes for Research in Japan: Short-term and Long Term	¥6.6 million (2006) (includes funding for long-term program)	343 short-term awards and 114 long-term awards in 2006	
Strategic International Cooperative Program	¥0.5 billion per year	56 projects supported (as of October 2006)	
Japanese Government Scholarship System	¥22.3 billion (2007)	Enrolments as of May 1, 2006 = 9 869	
Honours Scholarships	¥8 billion (2007)	Universities: 11 350 recipients Language schools: 650 recipients	
Short-term Student Exchange Promotion program	¥1.8 billion (2007)	1600 recipients	
Strategic Fund for Establishing International Headquarters in Universities	¥0.5 billion per year (2005-2009). Each university receives ¥10-50 million per year, depending on its plan.	20 universities supported	
Facilitating research abroad:			
Postdoctoral Fellowships for Research Abroad	¥3.8-5.2 million per year per person, depending on country of research	114 recipients in 2006	
International Training Programme	¥100 million per year (for 10 universities). Max of ¥20 million per university per year.		
Japanese Government Sponsored Dispatch Abroad system	¥395 million (2007)	120 recipients	
Short-term students exchange promotion program (dispatch)	¥523 million (2007)	665 recipients	

Source: OECD Questionnaire on the International Mobility of Researchers.

Korea

Economic incentives:

- Under the *Study Korea* programme (**S**), scholarships are available to foreign BA, MA and PhD students for study in Korean universities (www.studykorea.go.kr). This includes a period of language training.
- The Korea Science and Engineering Foundation (KOSEF) offers 6-12 month *post-doctoral fellowships* (**F**) for foreign researchers to work as staff members/researchers in an approved work program relevant to the field of their specialisation under Korean advisors.
- The *Korea-China Young Scientist Exchange* (**G**) provides grants for collaborative research, with payments to young scientist invitees (USD 1 700 per month) and inviting Korean organisations (USD 1 000 per year). Since 2002, only Chinese scientists have been invited and no Korean scientists dispatched. The visits have a duration of 6-12 months.
- The *Early Career Researcher Program* (**O**) between Korea and Australia enables young Australian scientists to work in Korea for 2 years of this 4 year pilot program (more details in research abroad section below).
- The *Summer Institute in Korea* (**O**) provides graduate students from Germany and the United States with the opportunity to gain first-hand experience in the Korean research environment, in an 8-week summer program. Travel costs are covered by the sending country, while Korea provides living expenses (www.kosef.re.kr).
- *Brainpool* (**S**) invites outstanding scientists and engineers from abroad to work in various research institutes in Korea for a period of 3 months to 2 years (with extensions available). Monthly allowances, and travel and moving expenses are provided (www.brainpool.or.kr).
- The *Exchange of International Researchers* (**G**) program offered by the Korea Research Foundation provides funding for outstanding new scientists and outstanding foreign student researchers to work and study in Korea in the fields of science and technology for a period of 2-4 years (www.krf.or.kr/KHPapp/eng/exchange.jsp). For scientists, grants of USD 1 000-1 500 per month are available; for students, grants of USD 700-900 per month are available.
- Under the *Invitation of Foreign Scholars for Lectures* (**G**) program, financial support is given to Korean universities to invite foreign professors in all fields of study, for a duration of up to 3 years. The grant is up to USD 80 000 per year per person.

Immigration: To facilitate the entry of foreign researchers and foreign high-tech professionals, Korea offers a *Science Card*, *IT Card*, and *Gold Card*, which are multiple-entry visas obtained under a fast-tracked procedure. The visas last for 5 years, with the possibility to extend the stay. The Science Card is aimed at people with qualifications and work experience in science and engineering, the IT Card is for IT human resources, while the Gold Card is aimed at professionals in one of 8 high-tech areas: e-commerce, new materials, transportation equipment, digital electronics, biotechnology, nanotechnology, environment and energy, and management of technology. The Gold Card also offers income tax exemptions (**T**) for up to 5 years for high-tech foreign engineers. See www.scard.go.kr, www.itcard.or.kr and www.goldcard.or.kr.

Recognition of qualifications:

Social and cultural support:

Research abroad:

- The *International Joint Research (G)* programme provides grants to Korean scientists to conduct collaborative research projects with foreign scientists for up to 2 years, in the fields of science and technology.
- Under the *Scientist Exchange (T)* programme, native researchers (professors or holders of PhDs) receive financial support for travel and living expenses for study visits at renowned overseas universities or research institutes. Visits are usually of 1 month duration. The programme operates within an agreement between KOSEF and 35 foreign organisations in 33 countries.
- The *Early Career Researcher Program (E)* between Korea and Australia is a pilot program of 4 years, where young Korean scientists (recent doctoral recipients) go to Australia in the 1st and 3rd year, and vice versa in the 2nd and 4th year of the program. For Korean researchers and their advisors going to Australia, KOSEF supports travel costs and the Australia-Korea Foundation supports living expenses (www.kosef.re.kr). The policy is based on the March 2006 agreement between KOSEF, the Australian Academy of Science, the Australian Academy of Technological Sciences and Engineering, and the Australia-Korea Foundation.
- The *Summer Institute in Korea (T)* (discussed above) also allows Korean graduate students to spend 8 weeks in Germany. Travel costs are paid by Korea, while Germany covers living expenses.
- The *International Collaborative Research (G)* policy provides Korean researchers with training and research opportunities with outstanding overseas universities and research centres (www.krf.or.kr/KHPapp/eng/Internationa_cr.jsp). The four sub-programs are:
 - (A) In the fields of S&T, new researchers visiting research centres: 1 year duration: grant of USD 25 000 per year per researcher;
 - (B) In the fields of S&T, dispatch of next-generation scholars: 6-12 month duration: grant of USD 25 000 per year per scholar;
 - (C) In the fields of S&T, working with local researchers at their facilities: 6-12 month duration: USD 3 600 per month per project; and
 - (D) In all fields, research at designated overseas research organisations: 2 weeks-3 years duration: USD 20 000 for 1-3 years collaborative research, 1-4 weeks of joint seminars, and with support of travel and living expenses for 2 weeks-3 months of scholar exchange.
- The Korea Research Foundation provides grants for *Overseas Study Visits of Professors (G)*, for native Korean university professors in all fields of study to spend 6 months or 1 year in a foreign university or research organisation. Grants are USD 15 000 for a 6 month study visit and USD 25 000 for a 1 year visit (www.krf.or.kr/KHPapp/eng/Internationa_cr.jsp).

Korean mobility policies: Budgets and geographic focus

<i>Policy/programme</i>	<i>Resources allocated</i>	<i>Outcomes</i>	<i>Geographical focus</i>
Facilitating inflows:			
Study Korea	For BA: USD 0.4 million For MA & PhD: USD 3.2 million Website: USD 57 000 Expos: USD 450 000 (2006 figures)	In 2006, scholarships to 100 MA and PhD students and 30 BA students.	For BA students, only developing country nationals. No country of origin restrictions for MA or PhD students.
Post-doctoral fellowships	USD 250 000 (2006)	12 awards (2006)	Aimed at developing countries.
Korea-China Young Scientist Exchange	USD 261 000 (2006)	10 persons (2006)	China
Early Career Researcher Program between Korea and Australia	Korea and Australia share costs	5 persons a year	Australia
Summer Institute in Korea		Up to 20 US and 25 German graduate students invited each year	United States, Germany
Brainpool	USD 6 million (2006)	91 invitees in 2006	No country of origin restrictions
Exchange of International Researchers	Scientists USD 6.7 million (2007) Students USD 2.5 million (2007)	30 scientists (2007) 150 students (2007)	No restrictions. Includes Korean immigrants who have lived abroad for more than 10 years.
Invitation of Foreign Scholars for Lectures	USD 1 million (2007)	17 projects (2007)	No country of origin restrictions.
Science Card, IT Card, Gold Card	Mainly administrative support.	In 2006, 164 Science Cards, 20 IT Cards, and 252 Gold Cards.	No country of origin restrictions.
Gold Card tax exemption			
Facilitating research abroad:			
International Joint Research	USD 1.5 million (2006)	100 projects (2006)	Native researchers
Scientist Exchange		60 persons (2006)	Native researchers
Early Career Researcher Program between Korea and Australia	Korea and Australia share costs	5 persons per year	Native researchers, destination Australia
Summer Institute in Korea		Up to 25 Korean graduate students sent to Germany per year	Native students, destination Germany
International Collaborative Research	In 2007: (A) USD 1 million (B) USD 2 million (C) USD 0.2 million (D) USD 0.6 million	In 2007: (A) 40 projects (B) 80 projects (C) 5 projects (D) 26 projects	Designated research organisations for part (D) are in Turkey, Egypt, Russia, Ukraine and the Czech Republic.
Overseas Study Visits of Professors	USD 1.9 million (2007) 50% to S&T, 50% to humanities and social sciences	6-month visit: 46 persons 1-year visit: 49 persons (2007)	

Source: OECD Questionnaire on the International Mobility of Researchers.

The Netherlands

The Netherlands Organisation for Scientific Research (NWO) executes the Dutch government's policies on the mobility of researchers. The NWO explores and co-ordinates research possibilities on the international level, participates in international networks and programmes, and promotes international knowledge exchange and mobility. In addition NWO ensures that national and international top facilities are accessible to both national and foreign researchers. NWO uses various instruments for the benefit of researchers, from giving information about international subsidies and providing help with submitting research proposals to international (framework) programmes to providing personal subsidies and access to international research facilities.

Economic incentives: The *Visitors Travel Grant (G)* offered by the NWO enables foreign visitors to stay in the Netherlands. There are also a number of subsidies and research programmes aiming at talented scientists that are open for applications by researchers affiliated with universities and institutes from abroad. The demands for admission may vary for each subsidy. Programmes include:

- *Innovational Research Incentives Scheme (G):* This consists of three different personal subsidy forms, each of which is designed for a different phase in the scientific careers of researchers, whether they only recently took their PhD or are already experienced and on the brink of a professorship.
- *NACCAP (EDCTP) (G):* NACCAP is a development-oriented support and research programme, financed by the Dutch Ministry of Foreign Affairs. NACCAP is a Dutch National Programme contributing to the goal and objectives of the European Developing Countries Clinical Trial Partnership (EDCTP). NACCAP's activities include open calls, commissioned projects, support activities and co-funding.
- *Population, Reproductive Health and Economic Development (PopDev) (G):* The research programme PopDev focuses on strengthening the evidence-base for policy and practice and identifying ways forward in research on how population and reproductive health impact poverty and economic growth.

Immigration: The Netherlands operates a fast procedure to stimulate the entrance of highly skilled immigrants. Under this procedure, no work permit is required, and the Dutch Immigration and Naturalisation Service (IND) will deal with applications within 2 weeks. A residence permit is granted for the duration of the contract, with a maximum of 5 years. Partners and children may accompany the skilled migrant, and will receive a residence permit for the same length of time as the knowledge migrant. A highly skilled migrant is one who earns at least €46 541 (gross annual income), or, if under the age of 30, €34 130. The income criterion is not applicable in some circumstances, for example, if the migrant has a paid PhD or postdoctoral position at an institute for education or research.

Recognition of qualifications:

Social and cultural support: The Netherlands participates in the European Network of Mobility Centers (Era-more), which offers a national website of the European Researcher's Mobility Portal (www.eracareers.nl). The Dutch Mobility Portal aims at providing mobile researchers intending to work and live in the Netherlands with updated, correct and easily accessible information concerning all matters related to their professional stay and daily lives. The Portal also aims at providing support staff, working at organisations hosting mobile researchers, with correct and easily accessible information in order for them to support the mobile researchers wishing to come and work at their organisation. There are three mobility centres in the Netherlands: the VSNU (www.vsnu.nl), representing the 14 Dutch universities, with

expertise in taxation, pensions, social security and employment conditions; Nuffic (www.nuffic.nl), which deals with internationalisation of higher education and has expertise in immigration procedures and the new Dutch health care system; and Senter Novem (www.egl.nl), which is the National Contact Point for the Marie Curie programmes, and has expertise in the Marie Curie programme, research funding in general, and social/cultural activities in the Netherlands.

Research abroad:

- The NWO is active outside Europe, with *co-operation* with the USA (National Science Foundation, Fulbright Award), Russia and various Asian economies such as China, Taiwan and Korea, which offers Dutch researchers a chance to do research in these countries (G). The NWO has also a co-operation agreement with the Japan Society for the Promotion of Science (JSPS), which provides various opportunities for doing research in Japan (G). Possibilities for co-operation with a number of fast-growing economies, such as India, are being explored.
- The NWO also offers a *Social Cohesion Travel Fund* (T), which is designed to promote international comparative research into the themes of the Social Cohesion Programme, by exchange of results and collaboration of researchers.
- The aim of the *Rubicon* (O) programme is to encourage talented researchers who have completed their doctorates in the past year the chance to gain experience at a top research institution outside the Netherlands (maximum of two years).

Other policies: By participating in various programmes, such as the European Strategy Forum on Research Infrastructures (ESFRI), the NWO facilitates multilateral initiatives for better use and development of *research infrastructure* inside Europe. The NWO enables the use and exploitation of subsidised research facilities inside and outside the Netherlands. This ranges from facilities for astronomical research, such as Lofar (Low Frequency Array) in Drenthe and the James Maxwell Telescope and Isaac Newton Group of Telescopes at La Palma, to seagoing expeditions and computing time at the national supercomputer at SARA in Amsterdam. The NWO also supports, via the WOTRO Foundation (Netherlands Foundation for the Advancement of Tropical Research), *research in and about the tropics* in the broadest possible scientific context. Capacity building in the countries involved plays a major role in this. NACCAP (Netherlands-African Partnership for Capacity Development and Clinical Interventions against Poverty-related Diseases) is an example of this.

Dutch mobility policies: Budgets and geographical focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
Visitors Travel Grant			
Innovational Research Incentives Scheme			
NACCAP (EDCTP)			
Population, Reproductive Health and Economic Development (PopDev):			
Facilitating research abroad:			
Co-operation programmes (NWO)			USA, Russia, China, Taiwan, Korea, Japan
Social Cohesion Travel Fund			
Rubicon			

Source: OECD Questionnaire on the International Mobility of Researchers.

New Zealand

Economic incentives:

- The policy of *Domestic Status for International Doctoral Students* (**T**) lowers the costs of PhD study to domestic fee levels for new international students in New Zealand, where they are supervised by leading researchers at NZ universities. It also allows the children of all international PhD students to attend school without paying international student fees. Information is available at www.newzealandeducated.com.
- The *Strategic Relocation Fund* (**G**) (supported by the Ministry of Research, Science and Technology – MoRST) assists world-leading researchers working in key areas of strategic interest to NZ to relocate to NZ and establish a research team. Funding is available on a 5-year term.
- The *EAPSI* (East Asia and Pacific Summer Institutes) (**O**) enables graduate students from the United States to gain first-hand research experience in other Asia-Pacific countries. The Institutes last 8 weeks from June to August, and participants conduct research in any area of science and engineering that is supported by the NSF (National Science Foundation – US): biological sciences; computer and information science and engineering; education and human resources; engineering; geosciences; mathematical and physical sciences; polar research; and social, behavioural and economic sciences. The program is supported by MoRST.
- The *New Zealand-Japan Bilateral Co-operation Programme* (**F**) seeks to strengthen science and technology co-operation between Japan and NZ through a range of activities, including workshops, scientist exchange, joint research projects and post-doctoral fellowships.
- The *Julian von Haast Fellowship Award* (**F**) allows internationally renowned German scholars and scientists to undertake research in NZ for a minimum of 4 weeks over a 3 year period. It is open to all fields of research and is awarded on excellence in research and the benefits for NZ research, science and technology. The Award comprises an annual stipend of NZD 16 000, a research/travel/support allowance of NZD 18 000, and a host institution administration allowance of NZD 4 000.
- The *Dumont d’Urville Science and Technology Support Programme* (**O**) provides support for scientific and technological co-operation between New Zealand and French researchers in the fields of biotechnology and nano-sciences, under an arrangement between the French Ministry of Foreign Affairs, the French Ministry of National Education, Higher Education and Research, and MoRST. Funding is provided for the development of collaborative exchange projects.
- The Ministry of Education provides *International Doctoral Research Scholarships* (**S**) for international students to undertake studies in NZ, covering full tuition fees of full-time doctoral study for 3 years and a NZD 20 500 per annum living allowance.
- The *Bilateral Research Activities Programme* (BRAP) (**O**) also allows overseas researchers to travel to NZ to work on joint research projects (see below).

Immigration: The Department of Labour administers New Zealand’s *Skilled Migrant Category* programme, which offers skilled migrants the opportunity to move to NZ to work and live permanently. Migrants must achieve a threshold of points, based on qualifications, experience, and personal qualities. A recognised qualification provides approximately one-third of required points, and covers the entire HRST

group (although is not targeted specifically at HRST). Some HRST occupations appear on target lists of occupations in shortage, which change in accordance with labour market conditions. This can allow holders of these occupations to benefit from 'bonus points' and streamlining of procedures.

Recognition of qualifications: The New Zealand Qualifications Authority maintains a List of Recognised Qualifications equivalent to an acceptable NZ qualification and also assesses other qualifications not on this list on a case-by-case basis.

Social and cultural support: A number of government agencies support migrants and their families in getting settled in NZ, although there are not specific support programmes for HRST migrants.

Research abroad:

- The *Bilateral Research Activities Programme (BRAP)* (T) is a sub-programme of the International Science and Technology (ISAT) Linkages Fund. The programme facilitates bilateral research through the funding of NZ researchers to travel overseas or overseas researchers to travel to NZ to work on joint research projects. The BRAP also supports the Science and Technology Co-operation Agreement signed in 1977 between the Governments of New Zealand and the Federal Republic of Germany and applications are welcomed from researchers and technologists wishing to establish or enhance collaborative projects with German counterparts.
- The *Fulbright-MoRST Awards* (F) allow promising graduate students to undertake postgraduate study or research at an institution in the United States in areas targeted to support growth and innovation in NZ: this includes enabling technologies such as biotechnology and ICT, emerging areas of science such as nanotechnology, and supporting areas of study relevant to New Zealand's sustainable economic development and future economic growth.
- Also the *New Zealand-Japan Bilateral Co-operation Programme* (F) and the *Dumont d'Urville Science and Technology Support Programme* (O) (outlined above).

New Zealand mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
Domestic Status for International Doctoral Students	NZD 2.5 million per year		
Strategic Relocation Fund	NZD 1.92 million per year		
EAPSI		15 students (2007)	United States
New Zealand-Japan Bilateral Co-operation Programme			Japan
Julian von Haast Fellowship Award	NZD 38 000	1 award per year	Germany
Dumont d'Urville Science and Technology Support Programme			France
International Doctoral Research Scholarships			
New Zealand Qualifications Authority			
Facilitating research abroad:			
BRAP			
Fulbright-MoRST Awards		12 per year	New Zealand citizen, destination United States
New Zealand-Japan Bilateral Co-operation Programme			Japan
Dumont d'Urville Science and Technology Support Programme			France

Source: OECD Questionnaire on the International Mobility of Researchers.

Norway

Economic incentives:

- The Research Council of Norway offers *International Scholarships (S)* to early stage researchers and advanced students (maximum 40 years of age) who wish to carry out research or parts of their studies in Norway. Several scholarship programmes are offered, financing a stay of up to one academic year, and covering all areas of academic study and research. (See www.rcn.no/is and www.siu.no).
- The *Norwegian Programme for Development, Research and Education (NUFU) (G)* has the joint goals of international development co-operation and increased mobility and collaboration in higher education and research. It offers project funding, available to Norwegian higher education institutions that offer PhD degrees and to institutions in the South (primarily in Norway's partner countries in Sub-Saharan Africa, Asia, Central America and the Middle East). Eligible project activities include joint research projects, education of Masters and PhD candidates, development of Masters and PhD programmes in the South, training of technical and administrative staff, and publication and dissemination of research results.
- The *Quota Scheme Scholarships (S)* administered by the Norwegian Centre for International Cooperation in Higher Education (SIU) aims to give students from developing countries in South, Central and Eastern Europe and Central Asia relevant education that will benefit their home countries on their return after graduation. Students or doctoral candidates who do not return home at the end of the funded period will have parts of their stipend converted to a loan. (An internal evaluation in 2007 found that a vast majority do leave Norway and are registered on an address in their home country, but recommended that tracer studies be done.) (See www.siu.no).
- The *Norwegian Cooperation Programme on Research and Higher Education with Russia (G)* aims to strengthen co-operation and mobility between Russia and Norway in higher education and research, with particular emphasis on areas of significance for the High North region. The programme welcomes joint applications from Norwegian institutions of higher education and research in collaboration with similar institutions from Russia.
- The *South Africa – Norway Programme for Research Cooperation (G)* aims to establish foundations for long-term research co-operation between Norway and South Africa through the funding of joint research projects based on equal partnership. The main objective is to achieve scientific excellence and relevance to the thematic areas of the programme (science, medicine and social sciences). The joint research projects should include one or more of the following elements: exchange of project staff and post-graduate students; exchange of scientific and technological information and documentation; joint laboratory and field work; provision of equipment grants (only to SA institutions); dissemination of research findings; and planning of joint participation in international research programmes. Researchers, postdoctoral candidates and postgraduate students are eligible, and young researchers from historically disadvantaged backgrounds in South Africa and women researchers are encouraged. Only joint applications are accepted (including one principal investigator from each country).
- The *Leiv Eiriksson mobility programme (S)* (see below) also allows researchers from the United States and Canada to spend 1-12 months in Norway, with a monthly allowance for travel and living costs.

Immigration:

- The Norwegian Directorate of Immigration offers *work permits for researchers, scholarships holders and lecturers*, with the aim of increasing the inward mobility of research and higher education personnel and thus strengthening the internationalisation of higher education institutions and research organisations. The applicant, if from a foreign country other than EU or EEA members, must have an offer of employment and an invitation from a research centre, higher education institution or organisation of professional or charitable nature. The permit is available for stays of longer than 3 months and may be renewed for a total of 4 years. (For stays under 3 months, a regular visitor's visa will suffice, or simply a passport for countries with visa exemption). Family members accompanying the permit holder may come to Norway under the rules for family immigration – case processing is shorter if the application is submitted together with the application for the principal person. (See www.udi.no).
- The Norwegian Directorate of Immigration also offers a *skilled worker/specialist work permit quota scheme*, aimed at facilitating the inward mobility of skilled workers needed in Norway, among them researchers and HRST. The annual quota is currently set at 5 000 permits. Family members accompanying the permit holder may come to Norway under the rules for family immigration – case processing is shorter if the application is submitted together with the application for the principal person.

Recognition of qualifications: The Norwegian Agency for Quality Assurance in Education (NOKUT) processes applications for general recognition of foreign qualifications, in accordance with the UNESCO and Council of Europe Lisbon Recognition Convention. Specific recognition (i.e. a degree in a specific academic discipline) of foreign higher education is carried out by individual higher education institutions in Norway – they recognise foreign education in relation to specific subjects and degrees at their respective institution and determine whether the foreign qualifications satisfy the specific requirements regarding the breadth and depth of the subject or degree.

Social and cultural support:

Research abroad:

- The Research Council of Norway's *International Scholarships (G)* (see above) are also available to researchers and students wishing to conduct a stay abroad.
- The *Norwegian Programme for Development, Research and Education (NUFU) (G)* (see above) is also available for research abroad.
- The *Norwegian Cooperation Programme on Research and Higher Education with Russia (G)* (see above) also provides funding for research in Russia.
- The *South Africa – Norway Programme for Research Cooperation (G)* (see above) also provides funding for research in South Africa.
- The *Leiv Eiriksson mobility programme (G)* promotes exchange of doctoral candidates and researchers between Norway and the United States and Canada. The programme contributes to a long-term escalation of R&D collaboration with these countries. It targets doctoral students and early stage researchers, and offers grants. (See www.rcn.no).

- The Nordic Council of Ministers / NordForsk, in co-operation with national research councils in the Nordic and Baltic countries and North-Western Russia, offer various *NordForsk Research Programmes (T)* that generally aim to encourage collaboration between these countries. While each programme has its own specific aims, a common denominator is that the recipients of NordForsk grants may use the funds to finance mobility within the region. Programmes include Nordic Centres of Excellence in Research, Nordic Research Schools, and Nordic researcher networks. Applicants must reside in Nordic countries or the adjacent Baltics or North-Western Russia. The duration varies between programmes, ranging from short-term (weeks or months) to long-term (several years). (See www.nordforsk.no).

Norwegian mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
International Scholarships (Research Council of Norway)	NOK 19.7 million (2007) (approx. €2.5 million)	Approx. 250 scholarships in 2007	
Norwegian Programme for Development, Research and Education (NUFU)	Budget for current programme period (2007-2011) is NOK 325 million (approx. €42 million)	59 projects receiving funding in current period. 32 institutions in 18 developing countries, and 10 Norwegian institutions, are participating.	Sub-Saharan Africa, Asia, Central America and Middle East.
Quota Scheme Scholarships	Approx. NOK 110 million (or €14.1 million) annually	The scheme provides yearly funding for 1 100 students and doctoral candidates (800 from developing countries in the South and 300 from Central and East Europe and Central Asia).	Targets certain developing countries on the OECD Development Assistance Committee (DAC) list, in particular, countries in South, Central and Eastern Europe and Central Asia, and Palestinian Territory.
Norwegian Cooperation Programme on Research and Higher Education with Russia	Budget for 4-year period from 2007 is NOK 48 million (approx. €6.2 million). Budget for 2002-2006 was BOK 39 million.	12 collaborative projects were funded in period 2002-2006. Projects for the next period will be awarded in October 2007.	Russia
South Africa – Norway Programme for Research Cooperation	Budget for 4-year period 2007-2010 is NOK 42 million (approx. €5.4 million). South African government to contribute ZAR 9 million (approx. €1.4 million).	27 projects funded in current period	South Africa
Leiv Eiriksson mobility programme			
Facilitating research abroad:			
International Scholarships (Research Council of Norway)	See above		
Norwegian Programme for Development, Research and Education (NUFU)	See above		
Norwegian Cooperation Programme on Research and Higher Education with Russia	See above		
South Africa – Norway Programme for Research Cooperation	See above		
Leiv Eiriksson mobility programme	For 2005-2007, budget was NOK 17 million (approx. €2.2 million). In 2008, NOK 6 million will be allocated.	116 grants in the period 2005-2007.	United States and Canada
NordForsk Research Programmes	Approx. €14 million annually, some of which is used directly to finance researcher mobility.		Nordic and Baltic countries plus North-Western Russia

Source: OECD Questionnaire on the International Mobility of Researchers.

South Africa

Economic incentives:

- The *South African Research Chairs Initiative (SARChI)* (**G**) aims to accelerate research and human capital development in South Africa and to develop requisite research capacities by attracting world-class researchers. The initiative was launched in December 2006 with the announcement of the first 21 Research Chairs, and has a goal of 210 Chairs by 2010. The Department of Science and Technology (DST) and the National Research Foundation (NRF) conceptualized the programme as a solution towards: retaining and attracting back qualified research scientists; reversing the systemic decline in research outputs; focusing capacity at publicly funded higher education institutions, science councils and research institutions; and contributing to stimulating strategic research across the knowledge spectrum. The initiative is expected to help South Africa retain and promote capacity within the higher education sector while imparting skills and expertise into the country's research community. (See www.nrf.ac.za/sarchi/index.stm).
- The *NRF Free-standing Postdoctoral Fellowship: Research in South Africa* (**F**) is open to any nationality, with a value of ZAR 60 000 (South African rand) per year, plus a ZAR 10 000 contribution towards running expenses. (See www.nrf.ac.za/studentsupport/).
- *Free-standing travel grants* (**G**) are available to enable South African universities and research institutions to invite researchers of recognised scientific standing from abroad to spend a period of 2 months or more in South Africa, to enrich local expertise in their field and to promote current and future collaboration.
- An agreement between *South Africa and Russia* brings approximately 35 Russian academics to South Africa to provide relief and opportunities for local academics to focus on their research (**S**). The stipend is tax-free.
- The NRF makes funding available to assist local researchers to organise various types of *scientific events* (conferences, symposia, workshops, and training courses) that address topics of importance to South Africa (**O**). Preference is given to conferences of international standing and that involve student participation. Funding is available for organisational costs, keynote speakers from abroad, foreign course presenters and sponsorship of attendees.
- Depending on the nature of the agreement, *accommodation* is subsidised for foreign researchers who visit South Africa on exchange programs (**O**).

Immigration: The 2002 Immigration Act provides for a number of work permits aimed at facilitating the inflow of foreign experts.

Recognition of qualifications: This task is performed by the South African Qualifications Authority – Centre for the Evaluation of Educational Qualifications (CEEQ). (See www.saqo.org.za/).

Social and cultural support: General support is provided by language training institutions, schools, clinics and hospitals, and religious and social clubs.

Research abroad:

- The *NRF Prestigious/Equity Scholarship for Doctoral study abroad (G)* is available to South African citizens, with a value of USD 12 000. (See www.nrf.ac.za/studentsupport/).
- The *NRF Free-standing Postdoctoral Fellowship: Research Abroad (F)* is open to South African citizens, with a value of USD 16 500 per year. (See www.nrf.ac.za/studentsupport/).
- There are a number of sources of *travel grants* that enable visits abroad by South African researchers. They include:
 - *Grant-linked travel grants (T)*, for example, related to Centres of Excellence, Institutional Capacity Development, International Science Liaison;
 - *Block grants (T)* – allocated to South African universities for various types of short-term travel grants, for example, international conference attendance, visits abroad (less than 2 months), short courses abroad (less than 2 months), and foreign research fellowships (less than 2 months);
 - *Free-standing travel grants (T)* – supporting longer-term travel (more than 2 months) as well as short term travel (less than 2 months), equipment-related mobility grants (to enable researchers to have access to research equipment), equipment-related training grants, and short-term travel grants for applicants based at Science Councils, Museums or National Facilities (who do not have access to Block Grants); and
 - *Directed travel grants (T)* – these include the Africa Programme (supporting South African researchers establishing links, networks and exchanges with their counterparts on the African continent), the Synchrotron Capacity Building Fund, various bi-national agreements, various agency-to-agency agreements, and the Humboldt-South African Awards (an agreement with the Alexander von Humboldt Foundation in Germany, which involves the exchange of two internationally renowned researchers between South Africa and Germany annually).

South African mobility policies: Budgets and geographical focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
South African Research Chairs Initiative (SARChI)	ZAR 200 million by 2007/08 financial year	210 Chairs by 2010	International, with focus on diaspora
NRF Free-standing Postdoctoral Fellowship: Research in South Africa			
Free-standing travel grants			
South Africa-Russia agreement			Russia
Scientific events			
Facilitating research abroad:			
NRF Prestigious/Equity Scholarship for Doctoral study abroad			
NRF Free-standing Postdoctoral Fellowship: Research Abroad			
Travel grants			

Source: OECD Pilot Questionnaire on the International Mobility of Researchers.

Switzerland

Economic incentives: No specific policy exists to attract foreign researchers to Switzerland. A large part of the research community is already foreign-born (45% of the doctoral candidates, 45% of the research staff, and 42% of the professors). The high salary levels are one reason for Switzerland's attraction to foreign researchers. Some general mobility-inducing policies include:

- The Swiss National Science Foundation (SNSF) *Professorships Programme* (G), which aims to attract young scientists with several years of research experience to resume their careers at a Swiss higher education institution, especially on return from a stay abroad. The funding covers the salary of the applicant (at assistant professor level), a contribution to research costs (incl. collaborators) and a contribution to infrastructure costs. The duration of funding is 4 years and can be extended by a maximum of 2 years. (See <http://www.snf.ch/e/funding/individuals/snsfprofessorships/seiten/default.aspx>).
- The SNSF *Individual short research visits* (O) for researchers from abroad to visit Switzerland. These visits are funded for one week to 3 months, and are aimed at initiating or consolidating international collaborations. Funding contributes to travel and living expenses (see www.snf.ch/e/funding/individuals/shortvisits/seiten/default.aspx).
- The SNSF *Exchange programmes* (O) with certain partner organisations abroad, which allow foreign scientists to conduct research in Switzerland for a limited period, hosted by a Swiss institution. Visits can last up to 12 months (see www.snf.ch/e/funding/individuals/exchange/seiten/default.aspx).
- A new programme to be introduced in 2008 – *Ambizione* – will aim to attract young scientists, especially on return from a stay abroad. Researchers will be subsidised for a maximum of 3 years with a salary and project funds (with a one-year extension possible) (see www.snf.ch/E/funding/individuals/ambizione/Pages/default.aspx).
- Switzerland also participates in all the European Union FP7 programmes.

Immigration: Switzerland has no special immigration programmes to attract foreign researchers. Researchers from EU/EFTA countries have the subjective right to reside and work in Switzerland, under the Agreement on the Free Movement of Persons (although some transition period restrictions apply). The immigration law includes some regulations for highly qualified foreigners from non EU/EFTA countries:

- Doctorate candidates and postdocs from non EU/EFTA countries working at a university are granted a work permit without being counted as part of the foreign quota. (The foreign quota limits the number of foreigners getting a work permit in Switzerland.) In some circumstances, this regulation is also valid for doctorate candidates and postdocs working in industry.
- Under Swiss law, if a Swiss and a foreign candidate apply for a job, the Swiss applicant must be taken. This article does not apply for highly qualified employees in fields with few applicants (e.g. science and technology), thus smoothing the work permit application process.
- Partners and children of highly qualified foreigners will easily get a residence permit or even a work permit (partners).
- Foreign professors at Swiss universities will immediately get a permanent residence permit and do not face the usual waiting period of 5 or 10 years.

- On January 1st 2008, a new Aliens Act will become effective, reducing obstacles for foreign HRST and highly qualified personnel.

Recognition of qualifications: Switzerland has agreements with Germany, Austria, Italy (at governmental level) and France (at university level) on diploma recognition. Switzerland has also ratified the Lisbon Convention, and runs a national information office “*Swiss ENIC*” that provides information and advice about university diploma recognition (see www.crus.ch/information-programme/recognition-swiss-enic.html?L=2). Besides these agreements and conventions, as the universities are autonomous, they are free to decide whom to admit for a doctorate or a professorship and whom to employ as a researcher. Most universities have internal regulations about diploma recognition. Private companies are free to accept or reject diplomas.

Social and cultural support: Switzerland has no government programmes that provide social or cultural support mechanisms especially designed for foreign researchers or HRST. There are general support mechanisms for foreigners settling down in Switzerland (*e.g.* language courses).

Research abroad: The SNSF offers postdoctoral researchers the possibility to stay at a research institution abroad with a SNSF *Fellowship for Prospective Researchers (F)*. The duration is generally 1 year, and applicants are required to have a PhD, Swiss nationality/residence/settlement/cross-border commuter permit and a connection with Swiss research. Funding includes personal maintenance, a fixed sum for travel expenses and may include a contribution towards research and conference expenses. (See www.snf.ch/e/funding/individuals/prospective/seiten/default.aspx). The SNSF also provides funding for *Individual short research visits (T)* world-wide and for *Exchange Programme (E)* visits with certain partner organisations abroad (details above).

Other policies: The Swiss Government has established Swiss science houses and science consulates that are funded from public and private sources. (See www.sbf.admin.ch/htm/themen/international/konsulate_en.html.) Their main goal is to promote Swiss science and R&D abroad, and provide information about job opportunities in Switzerland and abroad. They also maintain a webservice called *SwissTalents* (www.swisstalents.org), which comprises a database of Swiss scientists and scientists with strong links to Switzerland.

Swiss mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
<i>Facilitating inflows:</i>			
SNSF Professorships Programme	CHF 49.8 million (2006) (The programme is only partly aiming at facilitating inflows; it aims to attract young scientists in general).		
Individual short research visits	See below		
Exchange programme			Great Britain, Italy
Ambizione	Starts in 2008		
Swiss ENIC			
<i>Facilitating research abroad:</i>			
Fellowship for prospective researchers	CHF 29 500 000 (2006)	493 fellowships (2006)	
Individual short research visits	Approx. CHF 500 000 (includes spending on Exchange Programmes) (2006)		
Exchange programme	See above		

Source: OECD Questionnaire on the International Mobility of Researchers.

United Kingdom

Economic incentives:

- The *British Academy Visiting Fellowships* (F) enable early-career scholars from abroad to make research visits of at least two months to the United Kingdom. The maximum grant is £15 000. (See www.britac.ac.uk/funding/guide/intl/visfells.html).
- The *Royal Society Research Professorships* (G) provide 10-15 years support for internationally recognised scientists of outstanding achievement and promise. Applications are particularly welcomed from scientists currently resident outside the UK and who wish to return. The Professorships offer salary costs of £72 000 per year, a one-off start-up grant of up to £35 000 and research expenses of up to £16 000 per academic year. (See royalsociety.org/funding.asp?id=1126).
- The Royal Academy of Engineering offers a *Distinguished Visiting Fellowship Scheme* (F), to enable academic engineering departments in British universities to host a fellow from an overseas academic centre of excellence for up to one month. It also offers a programme of *Research Exchanges with China and India* (S), for academic researchers in universities in China and India to spend time at a British university (or vice versa). Awards may be for exploratory or networking visits of up to one month, or for project related visits of 3-12 months, and cover living expenses, travel and accommodation. (See www.raeng.org.uk/international/schemes.htm).

The United Kingdom also offers a wide array of programmes that encourage international collaboration in British science and innovation. The Global Science and Innovation Forum (GSIF) “*Strategy for International Engagement in Research and Development*” lists many of these², and those particularly related to mobility are detailed here (and in the ‘research abroad’ and ‘other policies’ sections below). In addition, a large number of fellowship programmes not specifically targeted at international mobility are open for foreign nationals with a previous association to the United Kingdom.

- The *European Science Foundation (ESF)* offers a range of networking schemes and conferences for researchers (O) across Europe, delivered in the United Kingdom by members of Research Councils UK (RCUK).
- The *International Scientific Interchange Scheme* (O) offered by the Biotechnology and Biological Sciences Research Council (BBSRC) allows BBSRC-grant holders and researchers at BBSRC-sponsored institutes to initiate and develop international activity through visits, workshops and bringing researchers to the United Kingdom.
- The *BBRSC Partnering Awards* (O) allow BBSRC-grant holders and researchers at BBSRC-sponsored institutes to initiate and develop long-term collaborative activity over 4 years, with exchanges, workshops and visits.
- The Economic and Social Research Council (*ESRC*) *Visits Programme* (O) enables international exchange visits to/from ESRC centres to stimulate future research agendas.
- The Engineering and Physical Sciences Research Council (*EPSRC*) *Visiting Researchers* (O) scheme brings expertise to the United Kingdom for the purpose of research collaboration and knowledge sharing.

² See www.berr.gov.uk/files/file34726.pdf (accessed 7 September 2007).

- *Research fellowships (F)* offered by the former Particle Physics and Astronomy Research Council (now part of the Science and Technology Facilities Council (STFC) and other Research Councils) are open to international applicants who wish to take up their fellowships at British institutions.
- The *Global Watch Service International Secondment (O)* scheme (offered through the Office of Science and Innovation) helps small-medium sized enterprises acquire advanced technological skills or knowledge not readily available in the United Kingdom, by receiving key people from abroad or sending employees abroad.
- The *Prime Minister's Initiative for International Education* (overseen by the Department for Innovation, Universities and Skills – DIUS) aims to attract international students into higher education institutions in the United Kingdom and to promote mobility of students from the United Kingdom. Part of this is achieved through the *Chevening Scholarship Scheme (S)*, which funds post-graduate research places.
- The *China Scholarships for Excellence (S)* (overseen by the DIUS) provide scholarships for Chinese post-doctoral and PhD students to study in British universities in the fields of science and technology. They also make provision for British post-doctoral students to study in China.
- The *Royal Society* offers several mobility-related schemes, including fellowships for postdoctoral scientists undertaking a research project with a named host in a British research organisation, short visit grants, and joint project grants that cover the costs of a series of visits between bilateral research partners over a period of 2-3 years (F,G).
- The *British Council Researcher Exchange Programme (S)* provides money for travel, subsistence and other expenses to enable early stage researchers to spend 2 week-3 month periods in British laboratories.
- The *UK-India Education and Research Initiative (G)* aims to encourage more active research partnerships with India in science and social sciences, and will include student and faculty exchanges, scholarships and research collaborations, funded via a mix of grants, scholarships, fellowships and institutional links.
- The *Dorothy Hodgkin postgraduate awards (S)* aim to attract outstanding students from developing countries to study for PhDs in top-rated British research environments.
- A partnership of the Royal Society, the British Academy, the Royal Academy of Engineering and Research Councils UK, will launch a new *International Fellowships Scheme*, with linked alumni engagement, in 2008/09.

Immigration: A further strand of the *Prime Minister's Initiative for International Education* enables overseas students to stay and work in the United Kingdom for a year after completing their degree, without the need for a work permit. The United Kingdom also administers a points-based highly-skilled migrant programme and a Sponsored Researchers work permit category for non-European Economic Area nationals (see www.workingintheuk.gov.uk).

Recognition of qualifications: The UK NARIC centre provides information and advice about vocational, academic and professional skills and qualifications from abroad (www.naric.org.uk). It is part of the wider European network of recognition centres.

Social and cultural support: As part of the ERA-MORE network, the United Kingdom hosts *Network UK* – a mobility portal and helpdesk at national level, supported by 12 mobility centres located around the United Kingdom, aimed at removing the barriers to mobility (www.britishcouncil.org/eumobility).

Research abroad:

- The Royal Academy of Engineering offers *Global Research Awards (G)* for engineers currently engaged in research and development to undertake projects in centres of excellence overseas. Secondments run for 3-12 months (taken in modules where required) and the award covers salary, travel, subsistence and, where necessary, family accompaniment costs. *International Travel Grants (T)* help engineering researchers make study visits overseas, especially to attend conferences. The *Research Exchanges with China and India (E)* programme also facilitates mobility abroad.
- The European Heads of Research Council's (EuroHORC) *Money Follows Researcher Scheme (G)* allows Research Council grant holders in the United Kingdom who are moving to an institution in another European country to apply to take the remainder of their grant with them.
- The *EPSRC INTERACT (O)* scheme initiates and develops collaborations through workshops and visits.
- The *EPSRC Overseas Travel Grants (T)* permit travel by British researchers to overseas research institutes for gaining insight into current research programmes.
- The *OECD Co-operative Research Programme (F)* (overseen by the Department for Environment, Food and Rural Affairs – Defra) offers postdoctoral fellowships for co-operative research in other OECD countries on biological resources in agriculture.
- Further *Royal Society* schemes include conference grants to assist British scientists attending conferences abroad, short visit grants and joint project grants (detailed above) (**T, G**).
- Other programmes, already detailed above, that also encourage outwards flows of HRST are: the *International Scientific Interchange Scheme (BBSRC)*; the *BBRSC Partnering Awards*; the *Visits Programme (ESRC)*; the *Global Watch Service International Secondment* scheme; the *British Council Researcher Exchange Programme*; and the *UK-India Education and Research Initiative (4xO,2xG)*.
- The *British Council SISTER database* assists scientists, technologists and engineers in the United Kingdom to find information about funding sources.

Other policies:

- *Facilities* belonging to the former Council for the Central Laboratory of the Research Councils (now part of the STFC – Science and Technology Facilities Council) are available to international users subject to successful peer review.
- Several of the Research Council UK members fund *subscriptions to international facilities and programmes*, so as to provide access for British researchers and to support collaborative working between the researcher and other international users. Examples include the European Synchrotron Radiation Facility, CERN, the European Space Agency and the Human Frontier Science Programme.

- The United Kingdom operates a *Science and Innovation Network (SIN)*, that comprises a global network of Science Officers who provide country-specific intelligence, promote access to and sharing of scientific expertise, resources and facilities, and help shape opinions and attitudes towards the United Kingdom and promote the United Kingdom as the R&D partner of choice. This helps to attract young people, know-how, access to facilities and expertise, and foreign investment. SIN is co-ordinated through the Science and Innovation Group in the Foreign Commonwealth Office (FCO) in London, in collaboration with the Government Office for Science (GO-Science) and the Chief Scientific Advisor.

British mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
Facilitating inflows:			
British Academy Visiting Fellowships	£275 000 in 2007/08	30 fellowships in 2007/08	Some funding earmarked for applicants from South Asia and the Middle East.
Royal Society Research Professorships	£1.1 million in 2007/08	11 professorships in 2007/08	
Royal Academy of Engineering Distinguished Visiting Fellowship Scheme and Research Exchanges with China and India	£161 000 for Distinguished Visiting Fellowships £217 000 for Research Exchanges (2007/08)	20 Distinguished Visiting Fellows and 10 Research Exchanges (2007/08)	Research exchanges: China and India
European Science Foundation	£680 000 annually		Europe
International Scientific Interchange Scheme (BBRSC)	£260 000 annually		Global
BBRSC Partnering Awards	£300 000 annually		Japan, China, India
ESRC Visits Programme			Global
EPSRC Visiting Researchers	£750 000 annually		Global
Research fellowships (STFC)	£2 million		Global
Global Watch Service International Secondments	£1 million annually		Global
Chevening Scholarship Scheme	£400 000 annually		
Prime Minister's Initiative for International Education	£7 million (2006/07)		
China Scholarships for Excellence	£840 000 annually	20 scholars in 2005/06 academic year	China
Royal Society schemes	£6.4 million in total (2007/08)		Fellowships: India, China and SE Asia (6-12 months) and US/Canada (12-36 months). Short visits: global Joint projects: Europe, CIS, South America, SE Asia, China, India and parts of Africa and Latin America.
British Council Researcher Exchange Programme	£500 000 annually		Global
UK-India Education and Research Initiative	£12 million annually		India
Dorothy Hodgkin postgraduate awards	£4.6 million annually		Developing countries
International Fellowships Scheme (linked alumni engagement) (Scheme announced November 2007, will be launched 2008/09)	£13.4 million over three years 2008/09 to 2010/11.	50 fellows annually	Global
UK-NARIC			
Network UK (ERA-MORE)	£91 000 annually		
Access to facilities (STFC)	Approx. £1.5 million annually		Global
Science and Innovation Network (SIN)	£10.6 million annually		30 countries world-wide
Facilitating research abroad:			

Policy/programme	Resources allocated	Outcomes	Geographical focus
Royal Academy of Engineering Global Research Awards, International Travel Grants and Research Exchanges with India and China	£461 000 for Global Research Awards £592 000 for International Travel Awards £217 000 for Research Exchanges (2007/08)	14 Global Research Awards 910 International Travel Awards 10 Research Exchanges (2007/08)	Travel grants: open to UK citizens and permanent residents
Money Follows Researcher Scheme	variable		Europe
EPSRC INTERACT	£312 000 annually		China, India, Japan
EPSRC Overseas Travel Grants	£472 000 annually		Global
OECD Co-operative Research Programme	£40 000		OECD
Royal Society schemes	Total detailed above		Conference grants: global
International Scientific Interchange Scheme (BBRSC)	Total detailed above		Global
BBRSC Partnering Awards	Total detailed above		Japan, China, India
ESRC Visits Programme			Global
Global Watch Service International Secondments	Total detailed above		Global
British Council Research Exchange Programme	Total detailed above		Global
UK-India Education & Research Initiative	Total detailed above		India
British Council SISTER database			
Subscriptions to international facilities and programmes	Approx £200 million annually		Dependent on facility/programme

Source: OECD Questionnaire on the International Mobility of Researchers.

European Commission

In 2000, the European Union launched the European Research Area (ERA) and committed to making Europe the most dynamic and competitive knowledge economy in the world by 2010. In 2002, the European Council then committed to increase investment in research to an average of 3% of member states' GDP. To meet the human resource challenge associated with these commitments, the EU's strategy on human resources has been based on making Europe more attractive to the best researchers, by providing a stimulus for people to enter the profession, by encouraging European researchers to stay in Europe, and by attracting to Europe researchers from all over the world. Next to measures fostering career development, enhancing mobility has been an important component of the activities taken up at the European level.

Mobility incentives: Under the European Union's Seventh Research Framework Programme (FP7 – 2007-2013), two schemes support individual researchers: the PEOPLE programme and the IDEA programme. Both schemes are bottom-up, by allowing researchers to define their research project in the field of their choice. The PEOPLE programme provides significant support for research mobility and career development, and is implemented via *Marie Curie Actions* (see <http://ec.europa.eu/research/mariecurieactions/>). The IDEA programme aims to provide a Europe-wide competitive funding structure, in addition to national funding, for 'frontier research' executed by individual teams. The programme is implemented through the European Research Council (ERC) (see <http://erc.europa.eu/>) and grants will be awarded through open competition to projects headed by young and established researchers, irrespective of their origins, who are working in Europe. *ERC Starting Independent Researcher Grants* will support researchers located in or moving to the EU and associated countries, who are at the stage of establishing and leading their first research team or programme. The *ERC Advanced Investigator Grants* will support projects by leading advanced investigators across the EU member states and countries associated to the framework programme.

Immigration: The *Scientific Visa* (European Commission Directive 2005/71) is a fast-track procedure for the admission of third-country researchers. Accredited research organisations certify the status of the researcher in the host country, acknowledging the existence of a valid research project, as well as the researcher's scientific skills, financial means and health insurance. Once a Member State grants a residence permit to the researcher, he/she is free to move within all European Union Member States for the purpose of the scientific project. In addition to the much faster administrative procedure for delivering the residence permit (immigration authorities of Member States will be required to deliver it in 30 days), researchers will have the possibility of submitting applications for residence permits directly to the authorities of the host Member State if they are legal residents in that country.

Recognition of qualifications: The *NARIC network* is an initiative of the European Commission and was created in 1984. The network aims at improving academic recognition of diplomas and periods of study in the Member States of the EU, the EEA countries and the associated countries in Central and Eastern Europe. All EU and EEA States and associated countries have designated national centres, the purpose of which is to assist in promoting the mobility of students, teachers and researchers by providing authoritative advice and information concerning the academic recognition of diplomas and periods of study undertaken in other States. The main users of this service are higher education institutions, students and their advisers, parents, teachers and prospective employers. Associated with this is the *ENIC network*, which was established by UNESCO and the Council of Europe. The Network is made up of the national information centres of the States party to the European Cultural Convention or the UNESCO Europe Region. An ENIC is a body set up by the national authorities. While the size and specific competence of ENICs may vary, they will generally provide information on: the recognition of foreign diplomas, degrees and other qualifications; education systems in both foreign countries and the ENIC's own country; and

opportunities for studying abroad, including information on loans and scholarships, as well as advice on practical questions related to mobility and equivalence. (See www.enic-naric.net/).

Social and cultural support: Researchers have free access to a Europe-wide customised assistance service offered by ERA-MORE, the *European Network of Mobility Centres*. These 200 centres in 32 countries assist researchers in all matters relating to their professional and daily life, including information on legal issues, social security, health and taxes, everyday life as well as family support. A central mobility web-portal can be found at http://ec.europa.eu/eracareers/index_en.cfm. The portal is a joint initiative of the European Commission and the 34 countries participating in the European Union's Seventh Framework Programme for Research. It is a one-stop shop for researchers seeking to advance their careers and personal development by moving to other countries. In addition to information on training and jobs, this electronic gateway is the entry point to practical information on living, working and relaxing in the European countries involved, through the widening network of national mobility portals. On the occasion of the 5th anniversary in 2008 of both ERACareers and ERA-MORE, the portal will be rebranded together with the Code and the Charter (see below). A high level launching event will be organised, probably in June 2008.

Other policies:

Several recent European-level initiatives aim to give individual researchers the same rights and obligations wherever they may work throughout the European Union. This should help counter the fact that research careers in Europe are fragmented at local, regional, national or sectoral level, and allow Europe to make the most of its scientific potential. In particular, the *European Charter for Researchers* addresses the roles, responsibilities and entitlements of researchers and their employers or funding organisations. It aims at ensuring that the relationship between these parties contributes to successful performance in the generation, transfer and sharing of knowledge, and to the career development of researchers. The *Code of Conduct for the Recruitment of Researchers* aims to improve recruitment, to make selection procedures fairer and more transparent and proposes different means of judging merit: Merit should not just be measured on the number of publications but on a wider range of evaluation criteria, such as teaching, supervision, teamwork, knowledge transfer, management and public awareness activities.

As announced by the Research Commissioner Janez Potocnik, the Commission will launch plans for a European Research Passport during the EU presidency of his native Slovenia, in the first half of 2008. The aim is to improve ERA employment and pension rights of researchers and to spur mobility (Research Europe, November 2007).

European mobility policies: Budgets and geographic focus

Policy/programme	Resources allocated	Outcomes	Geographical focus
PEOPLE programme – Marie Curie actions	Overall budget of more than EUR 4.7 billion over the 7 year period 2007-2013. Indicative allocations: Initial training of researchers (40%) Life-long training and career development (25-30%) Industry-academia pathways and partnerships (5-10%) International dimension (25-30%) Specific policy actions (1%)		
ERC grants	Overall budget of EUR 7.5 billion (2007-2013)		

Source: OECD Questionnaire on the International Mobility of Researchers.

Annex B: Institutional initiatives to enhance international mobility

Institutional initiatives to facilitate inflows of HRST

Via financial, social or other initiatives

Institution	Initiative	Resources allocated	Outcomes
Facilitating inflows (via financial, social or other initiatives):			
University of Vienna – Austria	<p>The University has committed itself to publish open positions internationally. As regards open positions for Chairs on professor-level, there in particular the university adheres to a strict rule, namely to generally hire only people from abroad; at least with no existing appointments.</p> <p>With respect to special research grants, it is the university's strategy to use grant money, especially money from foundations or dedicated money from the Austrian Federal Ministry of Science and Research, in order to promote incoming researchers.</p> <p>With respect to doctoral candidates at the university - especially within the scheme of the <i>Initiativkollegs</i> - project leaders are encouraged to promote open positions internationally. Out of 120 young researchers within this program scheme, about 60% have been coming from abroad within the last 2 years.</p> <p>The University also provides language classes, and support with housing, child care and visa requirements.</p>		
Universität für Bodenkultur Wien [BOKU] (University of Natural Resources and Applied Life Sciences, Vienna) – Austria	<p><i>International budget:</i> The aim of this initiative is to finance travel and subsistence costs for collaboration with partner universities. Activities that can be financed are travel and subsistence costs related to: development of joint research projects / joint teaching activities / joint master programmes / joint study exchange agreements; participation in international events; invitations to guest lecturers; guest lectureships at the partner university; and negotiation of partnership agreements.</p>		International budget – Number of incoming recipients (2006): 15
	<p>BOKU's Centre for International Relations offers social and cultural support via language and intercultural communication classes for BOKU staff and incoming students. It also assists with information concerning visa and insurance requirements, and with housing and general information on Vienna.</p>		Language courses: over 800 students attend per semester

Institute of Tropical Medicine, Antwerp – Belgium	<i>Sandwich PhD Scholarships:</i> This initiative aims to strengthen scientific capacity in the South by training researchers to PhD level in a scientific field that is relevant to their career, home institution and/or country. Scholarships are for 4 years and can be individual PhD scholarships or project PhD scholarships (where the candidate is linked to a scientific agency with an institutional collaboration with the ITM). ITM Student Services assist scholars with finding housing and also arranges visas.	Estimated budget for individual scholarships in 2008: €479 536 (including scholarships, insurance, family allowances, tickets and bench fees). Budget for project scholarships: varying.	As at 1 August 2007: 12 individual scholarships (maximum of 3 awarded per year); 10 project scholarships.
Université Catholique de Louvain (UCL) – Belgium	<i>Les bourses post-doctorales à l'accueil de post-doctorants étrangers:</i> This initiative invites foreign post-doctoral researchers to UCL for a period of 6-24 months. It aims to help promising young researchers, welcome researchers who may eventually become part of the academic staff of the university, and support UCL's poles of excellence. One funding round per year.	Estimated budget of €600 000 per year	
	<i>Le budget "Jeunes académiques":</i> Young researchers (Belgian and from abroad) joining the academic staff at UCL may access interim funds (up to €25 000) that allow them to initiate their research before getting external funding or FSR (Fonds spécial de recherche) funding.	Estimated budget of €250 000 per year.	
Academy of Sciences of the Czech Republic	<i>JE Purkyně Fellowship:</i> This initiative aims to attract outstanding creative scientists (both foreign and expatriate Czech) from abroad to work in research institutes of the Academy of Sciences for a period of up to 5 years. Three to four fellowships are awarded each year, to scientists under 40 years of age. The fellowship was named after JE Purkyně as a reminder that this outstanding 19 th century physiologist of Czech origin worked abroad until he was 62 as he had not been given adequate employment in his own country.		
University of Helsinki – Finland	<i>Helsinki International Staff Services:</i> This initiative (under development) will establish a helpdesk and web services to provide information for international researchers and teachers. Offices will be set up on two of the four campuses (Viikki and City Centre) in 2008. The service will collect and centralise the knowledge and information about, for example, immigration formalities, accommodation and daily life, and thus aid the departments that receive international staff members.	Plan to have two permanent staff to work on both campuses.	Expect service to help annually at least several hundred international researchers and other international academic staff.

	<i>Researcher and Teacher Mobility – incoming:</i> This initiative aims to guarantee the high quality and good international standard of research by encouraging mobility and to add to opportunities offered by externally funded programmes such as Erasmus and Nordplus. It has an incoming and outgoing component (see below). Incoming recipients must be from one of the University of Helsinki's partner universities.	Mobility: €250 000 per year in total (including university funding for Erasmus and Nordplus). Over half is spent as travel grants for outgoing researchers; the rest is for incoming researchers and teachers (accommodation and daily allowances).	Mobility (2006): 91 incoming Erasmus: about 100 incoming Nordplus: 26 incoming
Hokkaido University – Japan	<i>Grant to Hokkaido University Interuniversity exchange program (inbound):</i> This grant is targeted at projects for all-campus exchange, including multiple faculties. It aims to facilitate development of partnerships programmes that facilitate exchange between students (unit compatibility, double degrees, etc). The grant is for 8 months.	¥150 000-500 000 per project, 4 projects per year	
	<i>Overseas Office – Beijing:</i> This initiative aims: 1) To provide and collect information that helps to encourage exchange of foreign students and researchers between Hokkaido University and universities in China. 2) Implement interview examinations to pick out graduate students admitted to the University. 3) Carry out communication and co-ordination regarding the reception of Chinese students to the University. 4) Provide support to faculty members and researchers at Hokkaido University for their educational and research activities. 5) Provide support to former students and alumni of Hokkaido University for their graduates' gatherings and other activities in China. 6) Provide support to industry-academy cooperation between Japanese firms and Chinese universities.		
Tohoku University - Japan	<i>Tohoku University Liaison Offices:</i> These offices aim: 1. To enhance and establish international academic exchange and networks 2. To invite distinguished visiting professors and researchers to conduct their research through international collaboration and field work Locations: Siberian Branch of Russian Academy of Sciences, University of Cambridge etc		
The University of Tokyo – Japan	<i>Acceptance of Foreign Researchers:</i> This initiative invites foreign researchers to engage in collaborative research for the promotion of research at the University of Tokyo. Funding is usually for one year, but may be extended.	Salary plus commuting allowance.	

	<p><i>Internationalisation program (2005-2008):</i> This aims to:</p> <ol style="list-style-type: none"> 1. Consider the establishment of an institute for advanced research to which the University of Tokyo can invite the world's top-level researchers to conduct research and educational activities. 2. Foster co-operation in joint research, student exchange and long-term exchanges of faculty members with major foreign universities through the conclusion of international exchange agreements by departments and universities 3. Improve the environment so as to provide more incentives for international students, foreign researchers and foreign faculty members. For example, improve accommodation for foreign researchers (international guest houses), and provide more materials in languages other than Japanese. 		
	<p><i>International campus at Kashiwa:</i> Through the development and training of staff with the skills to manage international affairs, and the production of multilingual materials and documents and so on, create the foundations for an international environment and structure within the University of Tokyo.</p>		
	<p><i>Financial support for establishment and steering of overseas office by the University of Tokyo Fund:</i> This aims:</p> <ol style="list-style-type: none"> 1. To contribute the further internationalisation of the University of Tokyo. 2. To arrange for contacts with academic organisations and institutions of higher education in the countries in which they are located. 3. To promote joint research and student exchanges, hold workshops and symposia, and provide accommodation. 	<p>¥4 million for one office, 3 offices per year.</p>	
	<p><i>Overseas branch office at Beijing:</i> Aims to:</p> <ol style="list-style-type: none"> 1. Promote university-level exchange and co-operation with top-class universities and research institutions in China. 2. Promote co-operation with academia, industry and Government in China. 3. Assist excellent Chinese students in studying at the University of Tokyo, and promote study by Japanese students at top Chinese universities. 4. Support the activities of the University of Tokyo alumni organizations in China. <p>The University of Tokyo Beijing Office was the first foreign university office to be officially registered in China.</p>		

	<i>Visa Consulting service:</i> This initiative aims to respond promptly to questions about visa status and reduce the burden on University of Tokyo academic and administrative staff hosting international students and foreign researchers.		
Tokyo Institute of Technology – Japan	<i>International Academic Exchange Fund celebrating the Centennial of Tokyo Institute of Technology:</i> Under the financial support program for the invitation of foreign researchers, travel costs (travel expense, per diem allowance and lodging change) incurred by invited foreign researchers are subsidised.		
	The International Office at Tokyo Tech runs a “Supportive Programme”, advising international students on resources on and off campus, such as Japanese medical services, culture, and so on, as well as holding excursions and trips for students. Other support includes: 1. International Student Center for Japanese Lessons. 2. Student support divisions, and accommodation. 3. Student Associations (currently 8 different groups from Korea, Vietnam, Thailand, Pakistan, Philippine, China, Bangladesh and Indonesia). 4. Counselling service for employment and part time jobs. 5. Charity Bazaars and cultural expeditions.		
Nagoya University – Japan	<i>Liaison office Shanghai:</i> This initiative aims: 1) To promote and support collaborative international research and academic exchange with organisations in China. 2) To promote and support student exchange and collaborative educational programs with organisations in China. 3) To promote and support international industry-university joint activities in which Nagoya University and institutions in China are to take pivotal roles. 4) To engage in public relations activities for Nagoya University in China. 5) To connect the overseas network of Nagoya University Alumni Association as a branch office in China.		
Kyoto University – Japan	<i>Grant by the Kyoto University and Education and Research Development Foundation (inbound):</i> This initiative invites foreign junior researchers for 6 months to 1 year as foreign scholars or foreign co-operative researchers. Also open to Japanese nationals who have resided abroad for a decade or more.	Grants for travel (fixed amount of airfare by region) and sojourn (¥200 000 per month).	Usually 2 “long-term dispatches” and 5 “short-term dispatches” per year.

Kyushu University – Japan	<i>Academic Exchange Fund – Celebrating the 80th Anniversary of Kyushu University's Programs (inbound):</i> This initiative funds travel and per diem expenses for foreign scholars and researchers who have significant accomplishments in the areas of cultural, social and natural sciences, to join collaborative research, lectures, exchange of information and education and research at the graduate school. The initiative also actively promotes international academic exchange. Funding is for one week maximum.		
	<i>Branch offices (Seoul University, Gadjah Mada University):</i> This initiative sets up branch offices in major universities abroad and assigns international co-ordinators as needed to promote and support academic exchanges, student interactions, and collaborative studies, in addition to transmitting and collecting academic information.		
Waseda University – Japan	<i>Exchange Researcher and Exchange Faculty Member acceptance schemes (International Office, International Affairs Division):</i> This policy allows researchers who engage in study or research at a partner university or research institution to hold the same position at Waseda. Waseda may pay for sojourn expenses, depending on the particular exchange agreement.		
	<i>Overseas enterprises and outposts (China, Thailand, Singapore, Germany, USA):</i> This initiative promotes exchange of students and scholars, based on academic agreements with outstanding institutions around the world. For example, the Waseda-Olympus Bioscience Research Institute in Singapore, established in 2004, conducts specialised research into the human brain. With research activities in neuroscience, cognition and intelligence, this institute works towards improving quality of life and realising a better society.		
	<i>International Community Centre:</i> This provides support for students to engage in mutual exchange, and provides useful information.		
Osaka University – Japan	<i>Global Campus Net (GCN) – Osaka:</i> This initiative is an online community providing information for foreigners, including online Japanese learning materials, medical/child care information, housing information, used goods, etc. Exchange between fellow community members is possible through a bulletin board system. The bulletin board is multilingual and can be used to exchange information and receive online counselling on studying abroad.		
	<i>Overseas Liaison Offices:</i> In San Francisco (USA), Groningen (the Netherlands), Bangkok (Thailand). They aim to facilitate collaborative research projects being undertaken locally. They also take every opportunity to disseminate information about the university and support student exchange.		

	<i>ICHO Japanese program:</i> This initiative offers a community-like atmosphere for those who have just recently arrived in Japan, where spouses are likely to feel isolated.		
Swiss Federal Institute of Technology (ETH) Zürich – Switzerland	<i>Doctoral Programmes and Excellence Scholarship and Opportunity Programme:</i> These initiatives fund excellent PhD and Masters students from all over the world to study at ETH. Doctoral PhD candidates are paid a salary, while Masters students receive a scholarship. Masters students are chosen with a view to retaining them as future PhD candidates.		
	<i>Dual Career Advice:</i> This initiative aims to facilitate the professional and social integration of families from abroad, in order to achieve successful hiring and retention of foreign professors.	One permanent staff member.	
	<i>Eurosearch Zürich:</i> This facility acts as a mobility centre under the European ERA-MORE initiative, and provides support and advice for mobile researchers. It also provides support and one-on-one coaching of proposal submission and project management of research projects within the European Research Programmes.	Core team of 4 staff members.	
Various universities – Switzerland	<i>Doctoral programmes:</i> Several Swiss universities aim to attract excellent PhD candidates, from all over the world, with payment of a salary.		

Source: OECD Questionnaire on the International Mobility of Researchers

Institutional initiatives to facilitate research abroad

Institution	Initiative	Resources allocated	Outcomes
University of Vienna – Austria	<p><i>Brief Scientific Stays Abroad:</i> The university supports doctoral candidates to work on their projects abroad through this scheme (for stays of 1-3 months). In addition, financial aid is available (for example, research grants and travel grants).</p> <p>The Research Services and International Relations Office at the university monitors international grant opportunities. Exchange of researchers is also carried out through measures such as Erasmus or bilateral agreements on faculty and university level.</p>	Joint research & travel: €350 000 per year	
Universität für Bodenkultur Wien [BOKU] (University of Natural Resources and Applied Life Sciences, Vienna) – Austria	<i>International budget:</i> described above.		International budget 2006: 21 outgoing persons
	<i>KUWI Scholarships:</i> These scholarships aim to facilitate short-term research abroad (2 weeks – 7 months). They consist of a contribution to travel costs and a monthly allowance, according to the costs of living in the country of destination.		KUWI (for post-doctoral lecture qualification): 0 in 2006; 1 person in 2005
	<i>Forschungsfreiemester (Sabbaticals):</i> The aim of this initiative (which may be undertaken at home or abroad) is to allow scientists to concentrate on research work without having to fulfil teaching or administrative obligations. Resources are allocated on a case-by-case basis – salaries are not necessarily paid.		
Institute of Tropical Medicine, Antwerp – Belgium	<i>Five-Year Programme:</i> This initiative, in collaboration with the Belgian Directorate-General for Development Cooperation, aims to provide long-term support and sustainable strengthening of partner institutions in the South via joint research projects. For the period 2002-2007, ITM was involved in activities in medical, veterinary and scientific training, research and capacity building, in over twenty sister institutes in Africa, Asia and South America. For 2008-2013, collaboration agreements have been signed with 15 partner institutions in the South.	Annual budget approximately €10 million. For 2008-2013 budget of €12 million/year.	
Université Catholique de Louvain (UCL) – Belgium	<i>Les bourses post-doctorales: séjour de docteurs UCL à l'étranger:</i> This initiative helps young researchers from UCL to undertake research abroad. Two rounds of funding are offered each year (May and November).	Estimated budget of €75 000/year	

University of Helsinki- Finland	<i>Researcher and Teacher mobility – outgoing:</i> As described above, the University of Helsinki offers opportunities for international mobility to all researchers and teachers working at the university.	See above	Mobility (2006): 67 outgoing Erasmus: 75 outgoing Nordplus: 5 outgoing
	<i>Chancellor's Travel Grants:</i> University teachers and researchers studying at the University may apply for travel grants awarded by the University Chancellor in order to cover the costs of academically relevant foreign travel.	Budget is €1 million per year.	About 900 recipients per year
Keio University – Japan	<i>Keio Gijuku Fukuzawa Memorial Fund for the Advancement of Education and Research:</i> This initiative encourages researchers to research abroad. Duration is a maximum of 3 years, and funding is targeted at researchers under 35 years of age.	¥3 million per year	
Hokkaido University	<i>Grant to Hokkaido Interuniversity exchange program (outbound):</i> This is the outbound side of Hokkaido's exchange program (see above). It is open to faculty members.	¥150 000-500 000 per project, 4 projects per year.	
The University of Tokyo – Japan	<i>Grant for long-term research abroad:</i> This initiative aims to encourage researchers to research abroad and is aimed at professors, associate professors, assistant professors, and research associates.	¥2 million per person, for 6 people per year.	
Tokyo Institute of Technology – Japan	<i>International Academic Exchange Fund Celebrating the Centennial of Tokyo Institute of Technology:</i> This fund subsidises travel and sojourn expenses incurred by University faculty members sent overseas on international academic exchanges.		
Kyoto University – Japan	<i>Grant by the Kyoto University and Education and Research Development Foundation (outbound):</i> This fund subsidises part of the expenses incurred by faculty members and researchers sent overseas for research in their specialised areas. It is open to faculty members under 40 years of age. Airfares and sojourn expenses (¥200 000 per month) are allowed.		Long-term dispatch – usually 13 awards. Short-term dispatch – usually 5 awards, annually.
Kyushu University – Japan	<i>Academic Exchange Fund celebrating the 80th Anniversary of Kyushu University's programs (outbound):</i> This fund enables faculty members, preferably under 40 years of age, to participate in international research fora held overseas, and to travel abroad for academic exchange with universities that have concluded an academic exchange agreement with Kyushu. Duration is 5-10 days. A round-trip airfare and per diem are paid.		

Source: OECD Questionnaire on the International Mobility of Researchers

Institutional initiatives on internationalisation

Institution	Initiative	Resources allocated	Outcomes
Czech Science Foundation – Czech Republic	The Czech Science Foundation is part of the European Science Foundation, and is involved in the ESF Collaborative Research Program. An agreement on mutual co-operation has been concluded with the Austrian Science Foundation, the National Science Foundation (US), the Russian Foundation for Basic Research, the National Natural Science Foundation of China, the Netherlands Organisation for Applied Scientific Research (TNO), the Deutsche Forschungsgemeinschaft (DFG Germany) and the Korea Research Foundation.		
Hokkaido University – Japan	<i>Initiative for Sustainable Development (HUISD)</i> : This initiative aims to promote Hokkaido University's internationally competitive education and research, to increase diversity, and to make greater contributions to the international community through the spread of academic results and policy recommendations as well as the development of international co-operation activities. Funding is for 5 years.		
Tohoku University - Japan	<i>Principles of Strategy for International Exchange</i> : This aims to: 1. Promote research of the highest world standard through active participation in an international academic network 2. Invite highly motivated, capable and talented individuals from all over the globe and cultivate international leaders who can contribute to the advancement of world development 3. Communicate accomplishments in education and research internationally and contribute them to the international community 4. Strengthen the foundations of research and education and increase the university's international recognition.		
	<i>Tohoku University US Office</i> : This initiative aims to promote Tohoku University's global strategy for the next Millennium and to disseminate its research significance and potential to the world.		
Tokyo Institute of Technology – Japan	<i>Tokyo Tech Office Thailand</i> : This initiative is based on an Agreement of Cooperation with the NSTDA (National Science and Technology Development Agency) concluded in 2001. The office is equipped with IT facilities, such as a tele-conferencing system, a satellite wave-receiver and high capacity internet. Aims: 1. Lecture provision through satellite 2. Collaborative research 3. Information provision on study at Tokyo Tech, and tie-up with the Tokyo Tech graduates in Thailand		

	4. Co-ordinate academe-industry linkages, and run consulting services.		
	<i>Tokyo Tech Office Philippines:</i> Tokyo Tech has committed to various projects/programs in the Philippines. The office assists smooth and efficient operation of these projects.		
Nagoya University – Japan	<i>Academic Consortium 21 (AC21):</i> This is an international network composed of educational, research and industrial organisations throughout the world. It was established to encourage further advancement of global co-operation to the benefit of higher education and to contribute to worldwide and regional societies.		
Kyoto University – Japan	<i>Overseas offices:</i> Currently 34 offices. Kyoto University is building its own overseas research facilities, chiefly in Asia and Africa. Plans call for nearly half of the 22 projects that the university is running as part of “The 21 st Century COE (Centre of Excellence) Program” to be located in overseas research centres.		
Osaka University – Japan	<i>The Strategy for International Exchange of Osaka University:</i> This aims: 1. To promote research collaboration with scholars and institutions overseas and share the research results for the benefit of global society. 2. To promote education that fosters trans-cultural communicability and encourages constructive, creative action. 3. To build regional academic communities in Asia and work for human security and sustainable development.		
Kyushu University – Japan	<i>Overseas Offices (London, California, Munich, Seoul, Beijing, Bangkok):</i> These offices were introduced from April 2004, following the international strategy of “building a competitive and cooperative relationship on a global scale”, from the perspective of a need for operations in Europe and the United States with a ground in Asia, to promote and support collaborative studies with international companies as well as to transmit and gather academic information.		
Keio University – Japan	<i>Global strategies:</i> This programme aims to develop the international dimension of teaching and research activities, improve and broaden the undergraduate student experience through international opportunities, and strengthen and diversify international activities, thus building global alliances and Keio’s community network.		
	<i>Organization for Global Initiatives (OGI):</i> This aims at: 1) Development of the international dimension of teaching and research activities. 2) Broadening of the undergraduate student experience through international opportunities. 3) Strengthening and diversification of international activities through		

	<p>the university's system of overseas branches and offices, global alliances, and Keio's community network.</p> <p>4) Enabling the university to take a proactive role in creating international alliances, and expanding Keio's own global activities.</p> <p>5) Improving transparency and co-operation regarding international activities between Keio departments and organisations.</p>		
Waseda University – Japan	<p><i>University Policy for Promoting Internationalisation:</i> Waseda University has been making pioneering efforts to activate exchange with overseas institutions for promoting international research and education.</p>		
All universities – Switzerland	<p><i>Euresearch offices:</i> Each Swiss university has a local Euresearch centre that provides answers to questions about the EU Framework Programmes and support for proposal submission and project management of research projects within the European Research Programmes. The regional offices engage in individual coaching for researchers and SMEs in all project phases. Regional offices are located in Basel, Berne, Fribourg, Geneva, Neuchâtel, Lausanne, Lucerne, St Gallen, Ticino, and Zurich.</p>		

Source: OECD Questionnaire on the International Mobility of Researchers.



**WORKING GROUP ON THE STEERING AND FUNDING OF RESEARCH
INSTITUTIONS (SFRI)**

OECD Questionnaire on the International Mobility of Researchers

**May
2007**

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GUIDELINES FOR ADMINISTERING THE QUESTIONNAIRE

Please find attached a questionnaire about the international mobility of the highly skilled, and of researchers in particular. It has been developed by the Secretariat on the basis of contributions from the Lead Countries on the SFRI (ad hoc Working Group on the Steering and Funding of Research Institutions) sub-activity on international mobility. It has benefited from members' comments following the successful pilot of the questionnaire in late 2006 in Australia, Canada, Japan and South Africa.

Objective

The purpose of the questionnaire is to undertake an inventory of government policy practices and programmes to encourage the **inward** and **outward** international mobility of human resources for science and technology (HRST) and researchers in particular; and to analyse available evaluations that have been undertaken to assess the impact of such practices and programmes. Some policy examples are provided below:

Policy goals	Measures/programmes
Meet shortage of specialty occupations (e.g. software engineers)	Special immigration visas (France, Ireland, Germany, UK, US).
Promote young researcher mobility	Access by foreign students/researchers to national doctoral fellowships and post-doctorates (Australia, Germany, Japan, Italy, Sweden, US, UK, EC Marie Curie Actions). Provide the opportunity to research abroad temporarily (Japan, US, EC).
Attract foreign and expatriate researchers	Fellowships for mid-career and senior researchers (Japan); targeted fellowships and reintegration grants (Australia, Austria, Belgium, Canada, Italy, France, Greece, Hungary, Poland, Spain, EC Marie Curie Actions).
Retain foreign students	Facilitate access to the labour market by allowing foreign students to change their visa status (UK, Germany, US).

Administration

The questionnaire is being administered by delegates to the SFRI. Each participating country should consult with its relevant domestic organisations.

Focus of the Questionnaire

The target audience for the questionnaire is the respective **national** government ministry or relevant public organisation primarily responsible for dealing with the international mobility of HRST and researchers. This may include only one ministry such as the ministry for research but it also may include other ministries such as the labour/employment ministry, the social affairs ministry, and some other types of public organisations/agencies. If your country has **regional** government programmes and measures, please also provide details if possible.

Using Existing Surveys

Countries who already survey international mobility may wish to refer to these in responding to the questionnaire and in addition, provide copies of such surveys to the Secretariat contact listed below.

Schedule for Completion

The deadline for returning the completed Questionnaire is **3 September 2007**. The completed questionnaire should be sent to the OECD, care of Sarah BOX (contact details on cover).

SECTION A: DEFINITION OF KEY TERMS

Human resources in science and technology (HRST) – defined by the Canberra Manual as ‘people who fulfil one or other of the following conditions: a) successfully completed education at the tertiary level in an S&T field of study, and b) not formally qualified as above, but employed in a S&T occupation where the above qualifications are normally required’. It should be noted that the HRST definition of S&T is broad and covers ‘people actually or potentially employed in occupations requiring at least a first university degree’. **Highly skilled** – people possessing tertiary level qualifications. These people are captured in the HRST definition.

Researchers – defined by the Frascati Manual as ‘professionals engaged in the conception or creation of new knowledge, products, processes, methods, and systems in the management of the projects concerned’.

Doctorate holders - people who have followed a tertiary programme and have been awarded an advanced research qualification at ISCED level 6.³

Doctoral candidates – people enrolled in tertiary level programmes which lead to the award of an advanced research qualification at ISCED level 6.

Citizen & non-citizen – to be defined by the respondent. Figure 1, from the NESTI Careers of Doctorate Holders (CDH) project, highlights the variety of categories in use.

Figure 1: Distribution of a country’s population according to the origin of its inhabitants

	Citizens	Non citizens
Natives	1. Native and citizen by birth	5. Native and non citizen
	2. Native and citizen by naturalisation	
Foreign born	3. Foreign born and citizen by birth	6. Foreign born, non citizen and resident
	4. Foreign born and citizen by naturalisation	7. Foreign born, non citizenship and non resident

Source: OECD, Directorate for Science, Technology and Industry.

Mobility – there are many aspects to the concept of international mobility, including duration, motives and type of employment. For the purposes of this study, we generally define duration to be short-term (up to three months) or long-term (over three months), but respondents should feel free to use their discretion when classifying their policies.

³. The International Standard Classification of Education (ISCED) Level 6 is defined as: ‘tertiary programmes which lead to the award of an advanced research qualification. The programmes are therefore devoted to advanced study and original research and are not based on course-work only.’

SECTION B: CORE QUESTIONNAIRE ON THE INVENTORY OF NATIONAL POLICIES, PROGRAMMES AND THEIR EVALUATIONS

Considering the definitions in Section A of this questionnaire, please answer the following questions.

What is the overall strategy towards international mobility of HRST in your country, in particular:

a) Is there an explicit strategy in your country to encourage the inward and/or outward mobility of researchers, doctoral holders, doctoral candidates and/or HRST? (If yes, please provide a brief overview including an outline of any significant changes over the past 2 years).

b) Associated with this, is there a general webpage (or organisation) that provides essential information about the country to prospective immigrant researchers/HRST?

c) Is there a strategy or methodology to retain ongoing contact and connection with researchers and HRST who leave the country?

When answering questions 2 to 6, please utilise matrix A to provide information on:

1. i) Name of policy measure/programme.
2. ii) Description of policy/programme – for example: primary aim(s), why it was implemented, target audience (e.g. business, academia, public research organisations), when it was implemented, how it is ‘advertised’, duration, resources allocated etc.
3. iii) Name of the Ministry/agency responsible for the policy/programme. For members of the European Union, is the policy/programme part of an EU-wide policy approach?
4. iv) Description of eligibility criteria (for example: age of applicant, sex, country of origin etc).
5. v) Description of the outcomes (for example: number awarded per annum).
6. vi) Results of policy/programme evaluations if available, and whether the evaluation was conducted internally or externally.

Please also provide further information (brochures, newsletters, etc) or web links if available (preferably in English or French).

Where a policy/programme corresponds to more than one category in the matrix (e.g. aimed at providing both economic incentives and cultural support), please classify the policy/programme according to its primary aim and signal other categories to which it also belongs.

Are there government programmes or other measures in your country which provide economic incentives to attract foreign researchers/HRST or to attract return researchers/HRST (including doctoral holders and doctoral candidates)? Measures may include:

- Research grants or salary packages (for example, a special research grant to fund researchers who come/return to the country) and research-related financial aids (for example, financial aid to hire support staff and/or purchase equipment)
- Tax benefits (for example, tax concessions) and other economic incentives (for example, subsidised accommodation)

Are there government immigration programmes or other measures in your country which facilitate the entry of foreign researchers and/or HRST (including doctoral holders and doctoral candidates)? Measures may include:

- Visa regulations and citizenship
- Other immigration policies (including those relating to family members)

Are there government programmes or other measures in your country which provide strategies to integrate and recognise foreign qualifications to attract foreign researchers and/or HRST (including doctoral holders and doctoral candidates)? Measures may include:

- International cross certification of qualifications
- Other (e.g. public campaigns to enhance recognition of foreign skills/qualifications)

Are there government programmes or other measures in your country which provide social and/or cultural support mechanisms to attract foreign researchers/HRST (including doctoral holders and doctoral candidates) and returning researchers/HRST? Measures may include:

- Local networking (for example: community support such as language training, education for children, health service, insurance/pension, housing, daily life consultation, etc.)
- Other support mechanisms (including those for spouses/partners and family members)

Are there government programmes or other measures in your country which provide your national researchers (including doctoral candidates) with the opportunity to conduct extended research abroad? Measures may include:

- Financial aid (for example, research grants, travel grants)
- Other support (for example, information regarding opportunities abroad)

Do you have any additional comments?

A: Inventory of National Policies, Programmes and Evaluations

Category of policy measure	Name of policy measure	Description of policy	Responsible Ministry/agency	Description of eligibility criteria (e.g. age, nationality)	Resources allocated (e.g. annual budget)	Outcomes (e.g. number of awards)	Results of evaluations, if conducted	Further information, web links, if available
<i>Policies providing economic incentives</i>		Aim: Motivation for policy: Target audience: 'Advertising' method: Duration:						
<i>Policies facilitating entry of highly skilled people</i>		Aim: Motivation for policy: Target audience: 'Advertising' method: Duration:						
<i>Policies to integrate and recognise foreign qualifications</i>		Aim: Motivation for policy: Target audience: 'Advertising' method: Duration:						
<i>Policies providing social and/or cultural support</i>		Aim: Motivation for policy: Target audience: 'Advertising' method: Duration:						
<i>Policies facilitating research abroad</i>		Aim: Motivation for policy: Target audience: 'Advertising' method: Duration:						
<i>Other policies</i>								

SECTION C: OPTIONAL CASE STUDIES OF INSTITUTIONAL PRACTICES

Your country may have many other initiatives to enhance the international mobility of researchers and HRST at the **institutional level** (for example, specific programmes in universities, public research organisations, funding agencies or other bodies) that are not included in Section B of this questionnaire (national policies and programmes). Please select **two examples**⁴ or case studies of particular institutions or institutional practices (for example, initiatives undertaken in the largest university and largest public research organisation).

When answering questions 7 to 10, please utilise matrix B to provide information on:

- i) Name of institution and programme/initiative.
- ii) Description of the programme/initiative - (for example: aim, why it was implemented, target audience, when it was implemented, duration, resources allocated etc.).
- iii) Name of the institution responsible for the programme/initiative.
- iv) Description of eligibility criteria (for example: age of applicant, sex, country of origin etc).
- v) Description of the outcomes (for example: number awarded per annum).
- vi) Results of programme evaluations if available, and whether the evaluation was conducted internally or externally.

Please also provide further information (brochures, newsletters, etc) or web links if available (preferably in English or French).

Where an initiative corresponds to more than one category in the matrix (e.g. aimed at providing both financial incentives and cultural support), please classify the initiative according to its primary aim and signal other categories to which it also belongs.

Are there programmes or other measures in your institution which provide incentives to attract foreign researchers/HRST or return researchers/HRST (including doctoral holders and doctoral candidates)? Measures may include:

Personnel policies that reward overseas experience

Research grants or salary packages (for example, a special research grant to fund researchers who come/return to the institution)

Research-related financial aids (for example, financial aid to hire support staff and/or purchase equipment)

Provision of specialist research facilities and/or infrastructure

Other incentives (for example, subsidised accommodation)

Are there programmes or other measures in your institution which provide social and/or cultural support mechanisms to attract foreign researchers/HRST (including doctoral holders and doctoral candidates) and returning researchers/HRST?

For example: support from the local community such as language training, education for children, health service, insurance/pension, housing environment, daily life consultation, employment/training assistance for spouses, etc.

⁴. You are welcome to provide more examples.

Are there programmes or other measures in your institution which provide other support mechanisms to attract foreign researchers/HRST (including doctoral holders and doctoral candidates) and returning researchers/HRST?

For example, information campaigns, assistance with obtaining a visa, spouse programmes, adapting human resource practices.

Are there programmes or other measures in your institution which provide your national researchers (including doctoral candidates) with the opportunity to conduct extended research abroad? Measures may include:

Financial aid (for example, research grants, travel grants)

Other support (for example, information regarding opportunities abroad, support for spouses/partners and family members)

Do you have any additional comments?

THANK YOU

B: Institutional Initiatives to Enhance International Mobility

Type of initiative	Name of initiative	Description of initiative	Responsible institution	Description of eligibility criteria (e.g. age, nationality)	Resources allocated to initiative (e.g. annual budget)	Outcomes (e.g. number of awards)	Results of evaluations, if conducted	Further information, web links, if available
<i>Initiatives providing financial or infrastructure incentives</i>		<i>Aim:</i> <i>Motivation for initiative:</i> <i>Target audience:</i> <i>Duration:</i>						
<i>Initiatives providing social and/or cultural support</i>		<i>Aim:</i> <i>Motivation for initiative:</i> <i>Target audience:</i> <i>Duration:</i>						
<i>Initiatives providing other support mechanisms</i>		<i>Aim:</i> <i>Motivation for initiative:</i> <i>Target audience:</i> <i>Duration:</i>						
<i>Initiatives supporting research abroad</i>		<i>Aim:</i> <i>Motivation for initiative:</i> <i>Target audience:</i> <i>Duration:</i>						
<i>Other initiatives</i>								