



merics

Mercator Institute
for China Studies

**MERICS
FELLOWSHIP PROGRAMME**

**Guidelines and Information
for International Visiting Academic
Fellows**

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A MERICS FELLOWSHIP PROGRAMME GUIDELINES

The Mercator Institute for China Studies (MERICS) cooperates with universities and research institutes both in Germany and abroad. The MERICS **Fellowship Programme** will involve scientists and policy advisors from China, Europe and the US in the work of the think tank.

As International Visiting Academic Fellows, the internationally renowned experts contribute their exceptional expertise in one specific research programme. These are:

1. Foreign Relations (Goeconomics & International Security)
2. Public Policy (Policy-Making & Political Leadership)
3. Economy and Technology (Digitisation & Innovation)
4. Society (Social Groups & Media)

The fellowship advertisements focus on these specific research fields. MERICS requires that the fellows participate actively in the existing research and publication projects.

The German version of the “Guidelines and Information for International Visiting Academic Fellows” is binding. The English version is merely a translation.

A The MERICS Fellowship Programme

The MERICS Fellowship is a grant awarded to enable the fellow to carry out their research within one research programme at MERICS.

It does not constitute any relationship of employment with MERICS. It is exempt from taxation and social insurance deductions under the terms of German Income Tax Law. It is supposed to cover the living costs in Germany.

A.1 Duration and beginning

Fellowships are preferably granted for a period of between two and three months (short-term fellowships). In justified exceptional cases fellowships are granted for a period of between four and twelve months (long-term fellowships). Beginning and end of the grant will be set out in writing by MERICS and the fellow.

A.2 Extension

An extension of the funding period is possible in principle and must be requested in writing by the fellows. In consideration of the professional necessity and the available funds, the decision about the request lies with the institute management.

A.3 Journeys abroad within the funding period

During the funding period, the fellows may conduct short-term research visits abroad, if this is relevant for the research activity at MERICS and if this is possible in terms of residence legislation. Those visits require the approval of MERICS.

A.4 Fellowship amount

The amount of the monthly fellowship reflects, in particular, the fellow's academic and professional qualification and status as well as the professional experience. Decisions on the amount are made by MERICS.

The monthly amount of the short-term fellowship (two to three months) is:

- 2,000 EUR for Docs and Post-Docs
- 2,500 EUR for Assistant / Associate Professors and Junior Professionals with a maximum of five years of professional experience
- 2,700 EUR for Full Professors und Senior Professionals with a minimum of five years of professional experience.

The monthly amount of the long-term fellowship (four to twelve months) is:

- 2,000 EUR for Docs and Post-Docs
- 2,250 EUR for Assistant / Associate Professors and Junior Professionals with a maximum of five years of professional experience
- 2,500 EUR for Full Professors und Senior Professionals with a minimum of five years of professional experience.

The fellowship amount includes a monthly health insurance subsidy of 50 EUR.

A.5 Accommodation

The amounts mentioned above (A.4) include the costs for accommodation. Due to legal reasons, MERICS is not able to provide the services of a housing agency. And MERICS is not able to be the tenant of any apartment for the fellows. In every case, the fellow will be the tenant with the respective liability. The costs for accommodation would have to be paid by the fellows themselves from the rates mentioned above (A.4).

A.6 Fellowship payments

The fellowship is paid monthly at the beginning of each month, on the third working day of the current month at last.

For stays of more than two months, it is important that the fellows open a private bank account (current account, *Girokonto*) at a bank in Germany. The fellows shall inform MERICS immediately of their BIC and IBAN. All monthly rates and travel expenses will be transferred to this account.

For stays of a maximum of two months, all monthly rates and travel expenses will be transferred to the account stated by the fellows (BIC/SWIFT, IBAN, bank address).

A.7 Secondary incomes

The fellows are obliged to inform MERICS of any secondary income and grants by other funding institutions. They need to mention the type of activity, the names of the employers or funding institutions and, respectively, the investment of time. The amount of income is irrelevant to MERICS. There is no financial disclosure needed.

A.8 Interruption / ending of the fellowship

Engaging in other activities

In accepting the fellowship, the fellow enters into a commitment to devote him or herself fully to the purpose of the fellowship.

During the period sponsored by MERICS, pursuing any other highly time consuming paid activity, being unacceptable in terms of purpose of the fellowship and capacity, leads to the suspension or termination of the fellowship. This must be decided by MERICS on an individual case by case basis.

Absence

In exceptional cases, during the funding period of long-term fellowships with a minimum duration of six months, the fellows are allowed to be absent from MERICS for a maximum of 14 days in a row. MERICS must be given immediate notification of any circumstances demanding a longer period of absence (also due to illness). Prolonged periods of absence from MERICS require the written approval of MERICS.

The fellowship – and thus the payment of monthly fellowship instalments and allowances – may be discontinued in case of:

- periods of time from 14 days on spent outside Germany
- non-approved absence from MERICS
- continued illness.

Necessary attendance at conferences and research journeys related to the research activity do not count as absences.

A.9 Additional allowances

A.10 Travel expenses

Return travel expenses (flight: economy class, railway: 2nd class) to Germany are covered by MERICS. The reimbursement is made according to the travel expense guidelines of MERICS. Along with the fellowship confirmation, the fellow is told the maximum refund amount.

The maximum refund amounts are based on the travel allowances released by the German Academic Exchange Service (DAAD). The latter can be found online on the DAAD website (https://www.daad.de/medien/hochschulen/ww/hspartnerschaften/strp/aufenthalts-_und_reisekostenpauschalen_ausl__nder_nach_deutschland_2014_ausschreibung.pdf).

The reimbursement of the return travel expenses to Germany is a once-only payment. If the fellowship is interrupted, MERICS cannot grant a second travel allowance.

A.11 Start allowance

A non-recurring start allowance of 200 EUR is paid to the fellows together with the first instalment of the fellowship. This is intended to meet part of the expenses incurring at the beginning of the

fellowship period in Germany (e.g. the cost of finding accommodation, charges for excess luggage, administrative fees etc.).

A.12 Health insurance subsidy

The fellows take personal responsibility for their own sufficient insurance cover (health insurance, accident insurance).

During the funding period, MERICS pays the fellows a monthly health insurance subsidy of 50 EUR.

A.13 Exploitation of research results – publications and licenses

Use of the MERICS logo

MERICS requires that the fellows participate actively in research and publication projects. In publications and all other (especially public) presentations, appropriate reference should be made to the funding provided by MERICS.

If it is planned to use the MERICS logo, the following must be considered:

- The use of the MERICS logo in any kind of communication is subject to strict rules. The logo and its constituent parts are a trademarked name and may not be reproduced without obtaining the express written authorisation of MERICS. The logo comprises two parts: a figurative mark and a word mark with the two-line MERICS logotype (acronym and name of the institute). These elements jointly comprise the single corporate word and figurative trademark. The logo and its constituent parts may not be copied, altered, truncated or integrated in other logos.
- The use of the logo with the label “Unterstützt von/Supported by” requires the prior written approval by MERICS. The approval can be granted, if, in publications and all other, in particular all public, presentations (e.g. conference presentations), research results are presented, that were produced in direct connection with the sponsorship by MERICS, and if MERICS has prior knowledge of the content.
- Any other use of the logo requires the prior written approval by MERICS.

A.14 Report

Well before the end of the fellowship, MERICS requests the fellows to write a brief report on their experiences with MERICS during their stay in Germany. The reports should be appropriate in content and form to be used by MERICS for promotion of its Fellowship Programme. The essays are made accessible, where appropriate, in selected parts to the interested public on the MERICS website or in other MERICS publications.

A.15 Certificate

At the end of the fellowship, the fellows will receive a certificate about their research stay at MERICS.

B GENERAL ADVICE FOR THE STAY IN GERMANY

B.1 Status of the fellows

During their stay at MERICS, the fellows are no employees of the institute. The fellowship does not constitute any relationship of employment with MERICS, which is why, in this sense, the fellows do not pursue gainful employment. The fellowship is exempt from taxation and social insurance deductions under the terms of German Income Tax Law.

In accepting the fellowship, the fellow enters into a commitment to devote him or herself fully to the purpose of the fellowship. The fellows are able to do their research unconstrained by the need to follow instructions. They allocate their own time for themselves. Technical or safety instruction issued by the institute are accordingly not contractual instructions, but rather a means of support in fulfilling the purpose of the fellowship. However, since the fellows make regular use of the facilities made available by MERICS, they must comply with the rules and regulations generally applicable at MERICS.

B.2 Entry and residence

Issues relating to the right of residence are regulated in various laws and statutory instruments. Of particular relevance to the issues of interest here relating to the entry and residence of foreign fellows are the Residence Act (for foreigners who are non-EU citizens) and the EU Freedom of Movement Act (for EU citizens). European law, including, for example, EU regulations that have just come into force, also play a role. National statutory instruments relating to residence law, such as the Ordinance Governing Residence, govern more specific aspects of certain areas. However, other laws and regulations may also influence the subject matter described in the following.

MERICS does not give any guarantee and accepts no liability for the topicality, completeness and correctness of the information. However, MERICS will strive to complete and update it to the best of its knowledge.

B.3 Entry requirements

In general, foreigners require a visa to enter Germany. Depending on country of origin, purpose of residence and the planned length of stay, exemptions and visa facilitations are possible. The following generally applies: EU citizens and citizens of member countries of the European Economic Area (EEA) enjoy freedom of movement on the basis of the Act on the General Freedom of Movement for EU Citizens and may enter the country without a visa.

When the visa is issued, both entry and temporary residence are approved in the form of a stamp in the passport. Those who require a visa must always obtain this in their respective home country prior to entry. Responsibility for issuing visas lies with the German diplomatic agencies abroad duly authorised by the German Federal Foreign Office (as a rule, the Embassy or the Consulate General) and for some visas (so-called Schengen visa) also the diplomatic agencies of other Schengen states at the place at which the foreigner is usually resident.

The following groups of persons do not require a visa for entry: they are merely required to present a valid travel document (usually a passport). This passport must be valid at least until the end of the stay in Germany:

- EU citizens: EU member states are Belgium, Bulgaria, Denmark, Estonia, Finland, France, Greece, Great Britain, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Holland, Austria, Poland, Portugal, Romania, Sweden, Slovakia, Slovenia, Spain, the Czech Republic, Hungary and Cyprus. For citizens of these countries, only a valid Identity Card is required for entry.
- Citizens of the European Economic Area (EEA): Member states are Iceland, Liechtenstein and Norway. Here, too, an Identity Card is sufficient for entry.
- Citizens of Switzerland
- Citizens of Australia, Israel, Japan, Canada, the Republic of Korea, New Zealand and the USA. Citizens of these countries may apply for a residence title for more than three months in Germany. If they do not intend to take up gainful employment: Citizens of Andorra, Brazil, El Salvador, Honduras, Monaco and San Marino. If a (visiting) research activity does not exceed a period of three months in a year, the activity will not be regarded as gainful employment in the sense of the Residence Act. This then means that citizens of the said countries do not require a visa for such activity. For a stay extending beyond three months, a residence title can also be applied for in Germany even if entry occurred without a visa.
- If only a short stay of up to three months is planned and in which gainful employment is not to be pursued: Citizens of the countries Albania (only holders of biometric passports), Antigua and Barbuda, Argentina, Bahamas, Barbados, Bosnia-Herzegovina (only holders of biometric passports), Brunei Darussalam, Chile, Costa Rica, Guatemala, Croatia, Malaysia, Mauritius, Macedonia (only holders of biometric passports), Mexico, Montenegro (only holders of biometric passports), Nicaragua, Panama, Paraguay, Serbia (under certain circumstances for holders of biometric passports), Seychelles, Singapore, St. Kitts and Nevis, Taiwan (for holders of passports issued by Taiwan which contain a personal identification number), Uruguay, Vatican City und Venezuela.

It is not possible to extend these stays beyond three months without a visa. After a period of three months, the holder must leave the country. If a longer stay or gainful employment requiring approval is planned, entry with a national visa is an absolute requirement. Holders of national passports, who do not require a visa to enter Germany, may not, on principle, stay in the federal territory for any longer than 90 days per six-month period. Moreover, they may not take up gainful employment during this time.

- Researchers registered in another EU member state in accordance with the provisions of the EU Researcher Directive and who enter Germany within the scope of their research, as long as they otherwise work in a Schengen state or conduct their research activity in Germany for a maximum of three months within a 12-month period.

If a visa is required, this can be issued as a Schengen visa or as a national visa, depending on the length of the stay and the purpose of the stay.

B.4 Different visa types

The Schengen visa is issued for short-term stays lasting up to three months (90 days) per six-month period. A national visa is issued for longer stays planned to last more than three months.

Further differentiations are made within the two main categories based on the respective purpose of the stay. For example, a Schengen visa is issued for visits, business and tourist trips. A national visa is issued, for example, for study purposes, or for the pursuit of gainful employment.

German diplomatic agencies abroad generally post information on their websites about the procedure for issuing visas and on the required documents.

B.5 Schengen visa

The Schengen visa is to be applied for MERICS short-term fellowships (two to three months):

The Schengen visa:

- is issued for a purpose-related stay of up to three months within a 6-month period from the date of entry
- entitles the holder to travel freely and stay in the territory of the Schengen countries (Belgium, Denmark, Germany, Estonia, Finland, France, Greece, Iceland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Holland, Norway, Austria, Poland, Portugal, Sweden, Switzerland, Slovakia, Slovenia, Spain, the Czech Republic and Hungary)
- cannot generally be extended or changed for another purpose of residence. Only in exceptional cases an extension is possible, e.g. if medical treatment is urgently necessary
- is issued by the diplomatic agencies of the Schengen states.

The visa expires strictly after 90 days. Foreigners must leave the country after the visa expires.

Foreigners who enter Germany on a Schengen visa must also be able to prove they can cover their living expenses for the probable length of their stay in Germany.

Foreigners who enter Germany on a Schengen visa have to register with the local registration office within three months of entering the country.

B.6 National visa

The national visa is to be applied for MERICS long-term fellowships (four to twelve months):

The national visa:

- is issued when a longer stay (over three months) is planned
- can be issued for between three months and up to one year, in exceptional cases also for a longer period. The visa's period of validity depends on the respective planned purpose of stay
- primarily entitles the holder to stay in Germany – according to the redrafted Art. 21 of the Schengen Implementation Agreement, however, a national visa also entitles its holder to a stay of three months in a 6-month period in the territories of the other Schengen member states

- as a German national visa, can only be applied for at German diplomatic agencies abroad, in whose administrative district the foreigner has his habitual place of residence.

B.7 Residence

EU citizens and EEA citizens require no residence permit; these individuals are now only required to register with the registration authorities, a requirement that also applies to Germans. Depending on the local laws, registration must occur within the first few days or weeks of arrival. Any documents to prove that freedom of movement requirements have been met can be presented to the registration authority. For a stay lasting longer than three months, the following documents are required:

- proof of adequate financial resources and
- proof of adequate health insurance cover.

Adequate financial resources must be documented to ensure that no social security benefits from the host member state need to be claimed during the stay. This requires a proof of the nature and amount of the fellowship issued by MERICS.

If other third-country foreigners plan a stay that extends beyond the visa's period of validity, this stay must be authorised. In such cases, a residence permit or settlement permit is required. Foreigners who entered Germany on a national visa and plan a longer stay must have the temporary entry and residence permit included in their visa changed into a longer-term residence title before it expires.

However, in a few German diplomatic agencies abroad, it is possible to apply for a visa with a period of validity of the entire planned length of stay (maximum twelve months). In those cases no application for a residence permit at the local German Registration Office for Foreigners is required.

Foreigners who are allowed to enter Germany without a visa must also apply for a residence permit for a stay exceeding three months within three months of their arrival in Germany.

Foreigners from third countries who hold a valid longer-term residence title issued by one of the contracting parties to the Schengen Agreement are free to stay in the territory of the other Schengen countries for up to three months with this document and a valid travel document.

B.8 Residence permit

The residence permit is a temporary residence title. It can be issued subject to conditions or be extended. The residence permit is issued in connection with the respective purpose of residence.

For the application for a longer-term residence title (maximum twelve months), the following documents are required by the local German Registration Office for Foreigners:

- proof of MERICS' research activity
- proof of the applicant's qualification and reputation
- proof of adequate financial resources
- proof of adequate health insurance cover for the entire length of stay.

B.9 Health insurance

From the very first day, the fellows must be covered by health insurance providing adequate coverage in Germany for the entire duration of their stay in Germany. The Registration Office for Foreigners requires the proof of such an adequate health insurance cover. Since the fellows do not take up gainful employment, they must take out private health (travel) insurance.

Adequate health insurance policy must cover the following benefits:

- medical and dental treatment
- medicines/drugs, dressing/bandages, health/medical aids
- hospital treatment
- medical rehabilitation
- pregnancy and childbirth.

MERICs can recommend the fellows different insurance providers. The conditions and contents of insurance policies of each insurance company, however, differ greatly. The list of benefit exclusions needs to be considered in particular.

B.10 Contact at MERICs

Both in preparation of and during their stay in Germany, in any organisational matters, the fellows can contact:

Mercator Institute for China Studies (MERICs) gGmbH

Klosterstrasse 64

D-10179 Berlin

Telephone: +49 30 3440 999-0

E-Mail: info@merics.de

C ATTACHMENTS

C.1 MERICS-focus: entry from the PR China

C.1.1 Short-term fellowship: Application for Schengen visa

List of the required documents for the application for a short stay visa for professional purpose using the example of an unmarried employee from Shanghai, born 1980:

- Schengen application form
- Two recent, developed identity photos (size: 3,5 cm x 4,5 cm, with white background)
- Invitation letter, original
On official company paper with stamp and signature, mentioning clearly:
 - full address and contact details of the company
 - the name and position of the countersigning officer
 - purpose and duration of the visit
 - detailed program of the visit
 - person or the entity who will bear your travel and living costs and whether the sponsor gives financial guaranty for your return to China
 - Invitation letter must be hand-signed by the inviting party. Digital signatures are not accepted. A letter without an original signature will be considered as missing.
- Employment certificate, original
The letter from the employer (in English or German, or in Chinese with English/German translation) on official company paper with stamp, signature of a responsible person in the company, signature date and clearly mentioning:
 - address, telephone, fax number and contact person of the company
 - the name and position in the company of the countersigning officer
 - the name of the applicant, position, salary and years of service
 - approval for leave or absence
 - the purpose of the visit
 - confirmation of position after the return
 - the person or the entity who will bear the travel and living costs
 - Employment certificate, translation
Mandatory if the certificate is not written in English or German.
- A sealed copy of the Business license or Organization code or Institution legal person certificate (or other similar function certificate)
If you are employed with a university or a government financed institution, this document is not required.
- Bank statement of the employing company covering the last three months (except credit card record), copy
Mandatory if the costs are borne by the applicant or by the employer. If it is mentioned in the invitation letter that the inviter is in charge of the financial support, the bank statement does not need to be provided. If you are employed with a university or a government financed institution, this document is not required.
- Bank statement of the applicant covering the last three months (except credit card record), original

- Round-trip flight ticket reservation from/to China, copy
- Notarial certificate of the medical birth certificate, legalized by the Chinese Ministry of Foreign Affairs (containing translation to English or German), original
- Notarial certificate of the medical birth certificate, legalized by the Chinese Ministry of Foreign Affairs (containing translation to English or German), copy
- Proof of accommodation, copy
Covering the whole period of the stay in Schengen area. For example: Hotel bookings, rental apartment contract etc. Proof of accommodation has to be provided in a document separate from other documents requested in this list.
- Passport, original
A national private passport or official travel document valid for at least more than 3 months beyond the validity of the requested visa, with two blank visa pages with the mention “visa” to affix the visa sticker. Should be issued less than 10 years ago. The passport must be signed by its owner with an official signature in all the required places.
- Passport, copy
Copy of the first (identity information) page of the passport.
- Hukou, copy
Copies of the whole hukou including the holder pages and all member information pages.
- Temporary residence card, copy
If the Hukou was issued in a province outside of this consular area, please provide a temporary residence card or a temporary residence certificate, issued by the relevant local authority (e.g. police).
- Insurance, original and copy
 - The travel insurance should be: Valid for Schengen area if you apply for short stay visa.
 - The insurance must cover medical fees and repatriation costs up to 30.000 Euro (around 300.000 RMB).
 - The insurance coverage should cover the whole period of your stay.
 - If the insurance was issued by a Chinese insurance provider , it is advised to buy an insurance with a validity period, which is one day longer than the date of departure from the Schengen area.
 - If the insurance was issued by a Chinese insurance provider, the original is needed. If the insurance was issued by a well-established German insurance provider, a print out of the official confirmation of the insurance provider is sufficient.

More information about the requirements for Schengen visa from the PR China, see:

- <http://www.china.diplo.de/Vertretung/china/de/01-Visa-und-Konsularservice/01-visa/01-schengenvisa/00-schengenvisa-15092015.html>
- <https://cn.tlscontact.com/cnBJS2de/login.php?l=en>

C.1.2 Long-term fellowship: Application for national visa

List of the required documents for the application for a national visa for research purpose at the German diplomatic agency in PR China:

- Passport, still valid for at least six months, with two copies of the first (identity information) page
- Visa application form in duplicate, filled out in German, signed personally
- Three recent identical identity photos with white background
- Hukou, original, with German translation and two copies
- Invitation letter, original with two copies containing:
 1. Proof of MERICS being a privately funded research organization
 2. Proof of the fellow's qualification and reputation
 3. Description of the scientific research activity
 4. Specification of the duration
 5. Specification of the funding
- Employment certificate, original, with German translation and two copies
- University degree certificate, original with German translation and two copies
- Proof of adequate health insurance cover for the entire length of stay, original with two copies

The visa application fee is 60 EUR.

The German diplomatic agencies abroad cooperate with the Registration Office for Foreigners at the future place of residence in Germany. Thus, the processing time may vary from case to case. Applicants should expect a processing time of six to twelve weeks.

If the visa is issued for the entire length of stay, the application for a residence permit at the local Registration Office for Foreigners in Germany is not necessary.