

Rules for Applicants and Beneficiaries – Specific Part

(translation of selected parts into English)

Call: International mobility of research, technical and administrative staff of research organizations

Operational Programme Research, Development and Education Programming period 2014–2020



EVROPSKÁ UNIE Evropské strukturální a investiční fondy Operační program Výzkum, vývoj a vzdělávání



INTRODUCTION

This excerpt from the Rules for Applicants and Beneficiaries – Specific Part consists of selected parts of chapters that are relevant for foreign researchers who are either considering mobility or are already participating in mobility abroad, as well as for foreign host research organizations.

This is not a complete binding version of the Rules for Applicants and Beneficiaries – Specific Part. Their full text in the Czech language is annexed to the Legal Act on Grant Award/Transfer, issued for a specific project. The text is also in accordance with Methodological Letter No 1 effective from 28.04.2020, which supplements the Rules for Applicants and Beneficiaries – Specific Part with information on the implementation of projects related to the spread of coronavirus referred to as SARS-CoV-2, or with information on the implementation of projects affected by extraordinary measures related to force majeure¹.

DEFINITIONS OF TERMS USED

Unit

A unit is the basic part of an output (mobility/internship/hosting), into which the output can be divided for the purposes of project administration and subsidy payment.

Unit cost

Unit cost means the financial valuation of the unit, i.e. the amount of expenditure set by the Managing Authority, necessary for the implementation of the unit or delivering the output of the activity.

Expenditure

Expenditure means a unit cost corresponding to the number of units achieved.

Output

Output means the completed mobility/ internships/ hosting of research/ technical/ administrative workers, supported by the required documents.

Mobility/ internship/ hosting calculator

The mobility/ internship/ hosting calculator is an Excel file which is attached to the grant application and to regular Project Implementation Reports. It is used to calculate the total (expected and actual) costs of a specific mobility/ internship/ hosting.

Correction coefficient

The correction coefficient for mobilities (researchers' trips abroad, key activities 3 and 4) is a dimensionless constant number set individually for each country, which takes into account the level of living costs in the given country. The correction coefficient is used to multiply the unit costs according to the country of the researcher's stay abroad. The correction coefficients are taken from the European Commission's rules for MSCA-IF and recalculated so that the base value (1) of the correction coefficient is represented by the Czech Republic.

For internships of technical and administrative workers, the correction coefficient is used to calculate the amount per working day of the internship. The correction coefficients are taken from the ERASMUS

¹ These are extraordinary government measures in the Czech Republic and in other countries.

rules. According to this correction coefficient, the states are divided into three groups. One amount per internship working day is set for each group.

An overview of the values of the correction coefficients is attached as Annex 3 to the call. That appendix is in Czech only.

Post-doc

Post-doc means a researcher who was awarded their Ph.D. or its foreign counterpart no more than 7 years before the date of starting the mobility. The period may be extended by the period of maternity and parental leave, long-term illness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military service.

Junior researcher

A junior researcher is a researcher who is a Ph.D. student or obtained a Ph.D. or similar (ISCED level 8 equivalent) degree no more than 7 years before the date of the start of the mobility. That period may be extended by the period of maternity and parental leave, long-term illness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military service.

Senior researcher

A senior researcher is a researcher who obtained their Ph.D. or similar (ISCED level 8 equivalent) degree 7 years and more before the date of the start of the mobility.

Researcher from abroad

A researcher from abroad means a researcher who has worked outside the Czech Republic for at least 2 full years during the last 3 years (as of the date of starting the mobility) in research for at least 0.5 FTE or was a Ph.D. (or similar ISCED level 8 equivalent) student abroad. Citizens of the Czech Republic are not excluded.

Mobility

Mobility is a researcher's working visit abroad in the case of departures from the Czech Republic or a researcher's working visit in the Czech Republic in the case of arrivals to the Czech Republic. Each mobility represents the stay of one worker abroad or in the Czech Republic.

Mobility implementation period vs minimum duration of mobility

The mobility implementation period is expressed in months, the minimum mobility implementation period is 3 months and the maximum mobility implementation period is 24 months. The mobility implementation period covers the time worked and an aliquot part of the leave, incapacity for work for up to 2 months, care for a family member for up to 2 months and an obstacle to work for which the salary and wage/salary compensation paid by the employer are due.

The minimum duration of mobility (for activities 1 and 2) is set at 300 hours (corresponding to the equivalent of trivial support in activities 3 and 4). The duration of mobility includes only the hours in the days worked, in the amount corresponding to the researcher's FTE.

The trivial support corresponds to the educational activities (within the mobility) of the persons supported in activities 3 and 4. It is set at a minimum of 300 hours.

Internship/hosting

Short-term to mid-term stays of technical and administrative workers in foreign research organizations and in other entities engaged in research (activity 5) Hosting means the stay of foreign experts (technical or administrative) in a Czech research organization (transfer of know-how to the Czech environment, activity 6). The internship/hosting may last from 2 to 60 working days.

ELIGIBLE ACTIVITIES OF THE CALL

Arrivals to the Czech Republic

Activity 1: Working visits of post-docs from abroad in the Czech Republic

Activity 2: Working visits of senior researchers from abroad in the Czech Republic

Departures from the Czech Republic

Activity 3: Working visits of junior researchers abroad

Activity 4: Working visits of senior researchers abroad

For arrivals to the Czech Republic and departures from the Czech Republic

Support tool: Support for the researcher's family

The support tool can only be implemented in the project if combined with at least one of activities 1 to 4.

Internships/hosting

Activity 5: Internships of technical and administrative workers in foreign research organizations and other entities engaged in research

Activity 6: Hosting foreign experts (technical and administrative workers) in a Czech research organization (organization of the applicant/beneficiary)

A mobility (activities 1-4) must last at least 3 months and at most 24 months.

The duration of internship/hosting of technical and administrative workers (activities 5 and 6) must be at least 2 working days and at most 60 working days (depending on the country where the internship/hosting takes place).

A researcher can plan an interruption of their mobility. Such interruption must be taken into account in the submitted timetable. Mobility may be interrupted repeatedly based on a plan, but the interruption may not exceed 180 days cumulatively.

In serious and duly justified cases, there may be an unplanned interruption of the researcher's mobility for a maximum of 180 days (a sum of all unplanned interruptions).

Interruption of mobility due to force majeure is considered an unplanned interruption. Interruption of mobility due to force majeure does not count towards the unplanned interruption limit (180 days).

Interruption is not relevant for the internships/hosting, i.e. an internship/hosting cannot be interrupted. An internship/hosting is considered completed upon the return/departure of the technical/administrative worker.

Selection of workers

During the implementation of the project, the beneficiary is obliged to ensure a transparent selection of each researcher/ technical/ administrative worker who is to participate in the mobility/ internship/ hosting. After the selection of the researcher/ technical/ administrative worker, the beneficiary is obliged to inform the Managing Authority about the selection process and the selected persons (complete documentation on the selection procedure, justification, conversion of the H-index, etc.). The selection of the researcher/ technical/ administrative worker must comply with all of the conditions set out in this document.

The assessment of the selected researcher/ technical/ administrative worker is part of the approval of the project implementation report (hereinafter referred to as the "PIR"). If the conditions set out in this document are not met by a selected researcher/ technical/ administrative worker who has already started mobility, his/her mobility is considered ineligible.

One researcher can only participate in one mobility in a project. If one person participates in two mobilities, the expenditure (unit costs) related to the mobility which started later will be ineligible for financing from the Operational Programme Research, Development and Education.

One technical/ administrative worker can participate in internships/ hosting under the project in the total duration of 60 working days per calendar year, i.e. repeatedly, but in total sum of no more than 60 working days. Internships/ hosting over 60 working days in a calendar year are ineligible for financing from the Operational Programme Research, Development and Education.

General eligibility conditions of units, assessed in the implementation:

- The applicant must justify the need for a mobility/ internship/ hosting and the relevance of the selection of a specific research/ technical/ administrative worker to a specific workplace (department, laboratory, etc.) where the mobility/ internship/ hosting will be implemented.
- The applicant must define the specific and unambiguous objectives and benefits of the mobility/ internship/ hosting, e.g. establishing new or expanding existing cooperation, gaining contacts, transferring knowledge, transferring research methods, etc.
- The involvement of the researcher/ technical/ administrative worker in the research/ technical/ administrative work in the organization must be proportionate to their contribution to the specific work carried out in the organization (their role, degree of involvement, knowledge and experience in the field). In the case of departures from the Czech Republic, the involvement of the researcher/ technical/ administrative worker in the host organization must be adequate with regard to the potential for developing their skills (so that the quality, experience of the worker corresponds to their involvement in the team).
- In the case of departures from the Czech Republic, the host organization must have sufficient experience and capacity for the stay of the researcher/ technical/ administrative worker.

Any research outputs created during the implementation of mobilities must be published in the form of Open Access².

Overview of activities and their technical interpretation

1 month of employment of a researcher in a Czech research
organization (the unit is considered eligible if at least 85%
of the working hours falling within that month are worked).
If less than 85% are worked, the unit is eligible in its aliquot part.

Incoming mobility

Number and name of the key activity:	1 Working visits of post-docs from abroad in the Czech Republic
Objectives of the activity	Utilizing the potential of foreign researchers in the Czech Republic and internationalization of research.
Description of the implementation of the activity	Working visit of a foreign post-doc in the research organization of the beneficiary in the Czech Republic, working at the extent of 1.0 FTE on the research project(s). The post-doc brings to the Czech research organization foreign experience and skills associated with his/her previous experience abroad.
Unit cost	The value of the unit cost is CZK 121,950 .
	The minimum amount that must be used to cover the personnel costs of the researcher's mobility (including all obligatory expenditure ³) is CZK 84,518.
	This will be checked by the Managing Authority in a labour-law document and/or a similar document at the time of monitoring after the selection of the researcher and subsequently at the time of payment during the on-the-spot inspection.
	The maximum amount that the beneficiary can use to cover administrative and organizational costs associated with the implementation of mobility is CZK 37,432.

² If some research data cannot be published in the form of Open Access (according to General Annex L of the 2017 Work Programme of 25 July 2016), it must be properly justified as to why they do not meet the condition given by the call.

³ Obligatory expenditure usually includes social and health insurance contributions, health insurance for employees who reside abroad, travel allowances, etc.

The person selected for participation in activity **Working visits of post-docs from abroad in the Czech Republic** must meet, **on the date of starting the mobility**, all of the following conditions⁴:

- be a post-doc as defined above. If the selected person has not obtained a Ph.D., then his/her degree must correspond to level 8 of ISCED (International Standard Classification of Education). If the degree cannot be clearly classified at ISCED level 8, the beneficiary is obliged to provide nostrification of the researcher's education during the mobility (at the latest in the PIR submitted after the end of his/her mobility),
- 2. be a researcher from abroad as defined above,
- 3. prove publishing activity at least 2 publications in the last 3 years⁵.

Throughout the mobility, the post-doc must have a mentor who can be consulted.

Number and name of the key activity:	2 Working visits of senior researchers from abroad in the Czech Republic
Objectives of the activity	The aim of the activity is to transfer foreign experience to a research organization in the Czech Republic through the involvement of quality researchers from abroad, and the internationalization of research.
Description of the implementation of the activity	Working visit of an experienced foreign senior researcher in a research organization of the beneficiary in the Czech Republic, working for at least 0.5 FTE. In the Czech Republic, the supported researcher participates in research, or partly in teaching (as an addition to normal teaching).
Unit cost	The base value of the unit cost is CZK 155,923 . The unit cost of the implemented unit is the product of the base value of the unit cost and the FTE.
	The minimum amount that must be used to cover the personnel costs of the researcher's mobility (including all obligatory expenditure ⁶) is calculated as follows:
	CZK 118,491 x FTE.
	This will be checked by the Managing Authority in the labour-law document and/or a similar document at the time of monitoring after the selection of the researcher and subsequently at the time of payment during the on-the-spot inspection.

⁴ If the start of mobility is postponed due to force majeure, the fulfilment of these conditions can also be proven as of the date of selecting the participant.

⁵That period may be extended by the period of maternity and parental leave, long-term illness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military service.

⁶ Obligatory expenditure usually includes social and health insurance contributions, health insurance for employees who reside abroad, travel allowances, etc.

The maximum amount that the beneficiary can use to cover
administrative and organizational costs associated with
the implementation of mobility is calculated as follows:
СZК 37,432 х FTE.

The person selected for participation in activity *Working visits of senior researchers from abroad in the Czech Republic* must meet, **on the date of starting the mobility**, all of the following conditions:

- 1. be a researcher from abroad as defined above,
- 2. be a senior researcher as defined above,
- 3. meet the following performance criteria of a senior researcher:
 - H-index minimum value of 8.5 calculated according to the normalization table below called "Instructions for calculating the normalized H-index". The source for the conversion of the Hindex value is the Web of Science or Scopus. The calculation of the normalized H-index will be provided for each mobility together with other documents demonstrating the selection of the worker. A researcher in social sciences and humanities does not demonstrate the level of the H-index,
 - a share in at least one international grant or national grant over the last 5 years⁷ as an investigator or co-investigator,
 - publishing activity at least 3 publication outputs over the last 5 years⁸, see the definitions of terms.

Instructions for calculating the normalized H-index

The calculation will be compiled according to the following table:

Discipline	f
Agricultural Sciences	1.27
Biology & Biochemistry	0.60
Chemistry	0.92
Clinical Medicine	0.76
Computer Science	1.75
Engineering	1.70
Environment/Ecology	0.88
Immunology	0.52
Materials Science	1.36
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The normalizing factor⁹ f: $h_N = f \times h$

⁷ That period may be extended by the period of maternity and parental leave, long-term illness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military service.

⁸ That period may be extended by the period of maternity and parental leave, long-term illness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military service.

⁹ Source: Doing Hirsch proud; shaping H-index in engineering sciences.

Discipline	f
Mathematics	1.83
Microbiology	0.63
Molecular Biology & Genetics	0.44
Neuroscience & Behaviour	0.56
Pharmacology & Toxicology	0.84
Physics	1.00
Plant & Animal Science	1.08
Psychiatry	0.88
Space Science	0.74

Other conditions common to activities 1 and 2:

The researcher is obliged to actively¹⁰ participate in conferences/ seminars/ workshops, etc. organized by the beneficiary's institution, on average at least once every started 6 months of the mobility. (For mobility lasting 3 - 6 months: minimum one participation in such an event, mobility lasting more than 6 and maximum 12 months: at least two participations in such events, mobility lasting more than 12 and maximum 18 months: at least three participations in such events, for mobility lasting more than 18 and maximum 24 months – at least four participations in such events). If this condition is not met, all implemented units for the corresponding period (1 - 6 months) in which the worker was to participate in the given event are considered ineligible.

Activity output	Implemented mobility of a researcher in a research organization in the Czech Republic.
Documenting the output in the PIR	Monthly Activity Reports (see below) for each implemented activity unit (according to the template).
	After the selection of the researcher, the beneficiary will provide in the PIR (only once) simple copies of:
	• the labour-law document concluded with the selected candidate
	Diploma (or its nostrification)
	 Justification of the selection of the researcher or record of the selection procedure (signed by the statutory body of the beneficiary)
	 Professional résumé with reference to publishing activity

¹⁰ Active participation means a contribution of the researcher in the form of making a presentation, presentation of a poster, participation in a panel discussion, etc. The active participation of the researcher must be clearly demonstrable.

	Schedule of the mobility
	 Document(s) proving activity outside the territory of the Czech Republic for 2 years out of the last 3 years as of the start date of the mobility¹¹ (can be proved, for example, by a professional résumé, a proof of studying a Ph.D., etc.)
	• Brief description of the research on which the researcher will work, justification of the need for it in relation to the field (Justification of the relevance of the mobility, according to the template)
	Updated Mobility/ Internship/ Hosting Calculator.
Documenting the output at the	The on-the-spot inspection will check mainly the following:
on-the-spot inspection	 Meeting the mobility objectives – through an interview with the researcher
	Records of working hours
	• Originals of labour-law documents incl. any other documents from which it is clear that the researcher is entitled to the minimum amount of the value of the unit cost
	Originals of Activity Reports
	Original of the Mobility Schedule
	• Documentation of payments to the researcher
	 Original documents proving the active participation of the researcher in conferences/ seminars/ workshops, etc.
	Any other original documents provided when documenting the outputs of the activity in the PIR.

Outgoing mobility

Number and name of the key activity:	3 Working visits of junior researchers abroad
Objectives of the activity	The aim of this activity is to support the professional development of beginning young researchers through acquiring new experience and practice abroad, which will strengthen Czech research.

¹¹ That period may be extended by the period of maternity and parental leave, long-term illness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military service.

Description of the	Sending a junior researcher to a foreign research organization
implementation of the activity	and his/her involvement in a research project abroad.
	The junior researcher remains in an employment relationship with the beneficiary's organization for the duration of the mobility and the return phase.
Unit cost	The base value of the unit cost is CZK 121,950 . The unit cost of the implemented unit is the product of a part of the base value of the unit cost and the correction coefficient and the FTE. The correction coefficient is specified in Annex 3 to the call.
	The minimum amount that must be used to cover the personnel costs of the researcher's mobility (including all obligatory expenditure ¹²) is calculated as follows:
	[(CZK 69 029 x correction coefficient) + CZK 15 489] x FTE.
	This will be checked by the Managing Authority in the labour-law document and/or a similar document at the time of monitoring after the selection of the researcher and subsequently at the time of payment during the on-the-spot inspection.
	The maximum amount that the beneficiary can use to cover administrative and organizational costs associated with the implementation of mobility is calculated as follows:
	CZK 37,432 x FTE.
Activity output	Implemented mobility of a junior researcher in a foreign host organization, including the completed return phase.

The person selected for participation in activity *Working visits of junior researchers abroad* must meet, **on the date of departing for the mobility,** all of the following conditions:

- 1. be a junior researcher as defined above, If it is a Ph.D. student, this person must have a Ph.D. student status (in an institution domiciled in the Czech Republic)
- 2. be an employee of the grant beneficiary at a minimum 0.5 FTE for the mobility implementation period and have a trainer's recommendation (if it is a Ph.D. student)
- 3. have a mentor abroad who must meet the following performance criteria:
 - H-index minimum value of 8.5 calculated according to the normalization table above called "Instructions for calculating the normalized H-index". The calculation of the normalized Hindex will be provided for each mobility together with other documents demonstrating the selection of the worker. A researcher in social sciences and humanities does not demonstrate the level of the H-index,

¹² Obligatory expenditure usually includes social and health insurance contributions, health insurance for employees who reside abroad, travel allowances, etc.

• a share in at least one international grant or national grant over the last 5 years¹³ as an investigator or co-investigator, while this must not be an internal grant, or the mentor must prove publishing activity – at least 3 publications over the last 5 years¹⁴.

The Managing Authority recommends that the mentor devotes an average of 4 hours per week to the researcher and mentors a maximum of 5 researchers at a time during the implementation of the mobility¹⁵.

Number and name of the key activity:	4 Working visits of senior researchers abroad
Objectives of the activity	The aim of the activity is to support quality researchers in their further professional growth and so to develop the research organization that employs and sends them.
Description of the implementation of the activity	Sending a senior researcher to a foreign research organization and his/her involvement in a research project abroad.
	The senior researcher remains in an employment relationship with the beneficiary's organization for the duration of the mobility and the return phase.
Unit cost	The base value of the unit cost is CZK 155,923 . The unit cost of the implemented unit is the product of a part of the base value of the unit cost and the correction coefficient and the FTE. The correction coefficient is specified in Annex 3 to the call.
	The minimum amount that must be used to cover the personnel costs of the researcher 's mobility (including all obligatory expenditure ¹⁶) is calculated as follows:
	[(CZK 103 002 x correction coefficient) + CZK 15 489] x FTE.
	This will be checked by the Managing Authority in the labour-law document and/or a similar document at the time of monitoring after the selection of the researcher and subsequently at the time of payment during the on-the-spot inspection.
	The maximum amount that the beneficiary can use to cover administrative and organizational costs associated with the implementation of mobility is calculated as follows:
	CZK 37,432 x FTE.

¹³ That period may be extended by the period of maternity and parental leave, long-term illness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military service.

¹⁴ That period may be extended by the period of maternity and parental leave, long-term illness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military service.

¹⁵ Adherence to this recommendation will not be monitored in the implementation.

¹⁶ Obligatory expenditure usually includes social and health insurance contributions, health insurance for employees who reside abroad, travel allowances, etc.

Activity output

Implemented mobility of a senior researcher abroad, including the completed return phase.

The person selected for participation in activity *Working visits of senior researchers abroad* must meet, **on the date of being sent for the mobility,** all of the following conditions:

- 1. be a senior researcher as defined above,
- 2. meet the following performance criteria of a senior researcher:
 - H-index minimum value of 8.5 calculated according to the normalization table above called "Instructions for calculating the normalized H-index". The calculation of the normalized Hindex will be provided for each mobility together with other documents demonstrating the selection of the worker in line with the conditions of the call. A researcher in social sciences and humanities does not demonstrate the level of the H-index,
 - a share in at least one international grant or national grant over the last 5 years¹⁷ as an investigator or co-investigator, while this must not be an internal grant of the research organization,
 - publishing activity at least 3 publication outputs over the last 5 years¹⁸.
- 3. be an employee of the grant beneficiary at a minimum 0.5 FTE a month for the period of the mobility implementation.

Other conditions common to activities 3 and 4:

The minimum working time during the mobility implementation is 0.5 FTE.

The researcher is obliged to participate in conferences/ seminars/ workshops, etc. on average at least once every started 6 months of the mobility. It may be an event organized by other than the host institution or, if the event is organized by the host institution, it must be an international event. (For mobility lasting 3 - 6 months: minimum one participation in such an event, mobility lasting more than 6 and maximum 12 months: at least two participations in such events, mobility lasting more than 12 and maximum 18 months: at least three participations in such events, for mobility lasting more than 18 and maximum 24 months – at least four participations in such events). If this condition is not met, all implemented units for the corresponding period (1 - 6 months) in which the worker was to participate in the given event are considered ineligible.

Mobility can be implemented within as well as outside the European Union.

¹⁷ That period may be extended by the period of maternity and parental leave, long-term illness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military service.

¹⁸ That period may be extended by the period of maternity and parental leave, long-term illness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military service.

The conditions in the following table apply to both activities 3 and 4:

Documenting the output in the PIR	Monthly Activity Reports (see below) for each implemented unit (according to the template).
	Activity Report in the return phase (according to the template). It is submitted only after the end of the return phase.
	After the selection of the researcher, the submitted PIR will include simple copies of:
	• the labour-law document concluded with the selected candidate
	• Diploma (or its nostrification; in the case of a Ph.D. student, a student certificate)
	Professional résumé of the researcher
	 Professional résumé of the mentor (in the case of a junior researcher)
	• Calculation of the normalized H-index of the senior researcher, if relevant
	Schedule of the mobility
	• Trainer's recommendation in the case of a Ph.D. student
	• Calculation of the normalized H-index of the mentor, if relevant
	 Justification of the selection of the researcher or record of the selection procedure (signed by the statutory body of the beneficiary)
	 Brief description of the research on which the researcher will work, justification of the need for it in relation to the field and information on the host organization (Justification of the relevance of the mobility, according to the template)
	 Contract/ agreement/ memorandum¹⁹ on cooperation or a similar document with the host research organization (containing a commitment to pursue exclusively a non-economic activity of the researcher for the duration of the mobility. It must also address financial flows between the institutions involved and their consent with the mobility schedule).
	 Updated Mobility/ Internship/ Hosting Calculator.

Updated Mobility/ Internship/ Hosting Calculator.

¹⁹ For each cooperation established, the beneficiary presents 1 memorandum regardless of the number of internships/ hosting between the two organizations.

Documenting the output at the on-the-spot inspection	 The on-the-spot inspection will check mainly the following: Meeting the mobility objectives – through an interview
	 Originals of labour-law documents incl. any other documents from which it is clear that the researcher is entitled to the minimum amount of the value of the unit cost
	Originals of Activity Reports
	Original of the Mobility Schedule
	• Documentation of payments to the researcher
	 Original documents proving the participation of the researcher in conferences/ seminars/ workshops, etc.
	Any other original documents provided when documenting the outputs in the PIR.

Support tool

Name of the support tool	Support for the researcher's family
Objectives of implementing the tool	The aim is to reconcile the researcher's work and private life.
Tool description	It is a support tool for the development of human resources in research, taking into account the personal needs of the researcher.
	The support tool is designed to ensure the researcher's contact with his/her family members. A family member is considered to be a spouse or person with an equivalent relationship legally defined in the country where it was formalized, or own dependent child or a dependent child entrusted to their care.
Demonstrating the entitlement to the support tool	Affidavit proving the relationship between the researcher and another person.
	Any change in the relationship of the persons to the researcher shall be indicated by the beneficiary in the Activity Report.
Unit of the support tool	1 month. The number of implemented units is determined according to the number of calendar months in which the mobility units of the same key activity were implemented. Only units for which the conditions for the provision of support from the support tool were met for the whole month shall be counted in.

Unit cost	The base value of the unit cost is CZK 12,908 . The unit cost is determined regardless of the number of family members and without applying the correction coefficient.
	The unit cost of the implemented unit is the product of the base value of the unit cost and the FTE.
	The funding claimed for the support tool of the given mobility must be provided to the researcher.
Documenting the unit in the PIR	The unit is considered documented by substantiating the mobility unit to which it is linked ²⁰ .
Output of the support tool	Implemented mobility of the researcher, which includes the support tool.

Internship/hosting

Number and name of the key activity:	5 Internships of technical and administrative workers in foreign research organizations and other entities engaged in research
Objectives of the activity	The internships of supported persons in foreign organizations are expected to deepen the qualifications and professional knowledge of the supported persons, transfer know-how to the Czech research organization and network with experts from foreign centres. The main goal of this activity is to start a long-term cooperation of the supported Czech research organization with the foreign organizations involved.
Description of the implementation of the activity	Internship of a technical and administrative worker in a foreign research organization.
	The internship may last from 2 to 60 working days.
	The supported worker will travel to a foreign organization on the basis of a memorandum or a similar document between a Czech and a foreign research organization.
	The internship may include practical training in the form of involvement of the supported person in non-economic research activities of the foreign organization (learning by doing).
	The aim of the activity (during the research project) is not the implementation of joint research aimed at creating joint research results.
	After completing the internship, the supported person is obliged to prepare an Activity Report (see below), which will describe

²⁰ If only an aliquot part of the unit cost is eligible, the support tool is also eligible on a pro-rata basis.

		•	and a final evaluation
	of the experience shar	ing.	
	It is assumed that ea	0 1	•
	formal/ non-formal/ i at the extent of 4 hou	-	the supported person
Unit of activity	Cost of 1 working day	· · ·	
Unit cost	The value of the unit o	ost is determined as f	ollows:
	The value		
	of the correction coefficient	Calculation	
	of the destination	of the amount	Amount per day
	according	per day	
	to the annex 3		
	to Call		
	0.480 – 0.799	CZK 5,654 x 0.75	CZK 4,240
	0.8 – 0.999	CZK 5,654 x 0.875	CZK 4,947
	1.0 - 1.520	CZK 5,654	CZK 5,654
	The total number of	f unit costs for 1 ir	nternship is reported
	according to the num	-	-
	completed in the part		
	The unit cost can be allowances of the sup	•	•
			eals + out-of-pocket
			ociated with practical
	training, etc. At the	•	•
			ve and organizational the implementation
	of the internship.	associated with	
Activity output	Implemented interns	hip of a supported	person in a foreign
··· , ··· , ···	research organization		
Documenting the output in the	After the selection	of the technical/ac	ministrative worker,
PIR	the beneficiary shall p	rovide in the PIR simp	le copies of:
	Employment c	contract of the suppor	ted trainee (job title)
	Justification	of t	he selection
		al/administrative wo	
			d by the statutory
	representative	e of the beneficiary)	

²¹ This is not monitored in the implementation. For the purposes of the unit, it is assumed that, within a working day of the internship, 4 hours correspond to the training of the supported person.

•	Professional CV of the technical/administrative worker
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- Internship schedule
- Brief description of the benefits of the internship, e.g. establishing new or expanding existing cooperation, gaining contacts, transferring knowledge, justification of the need for the internship with respect to the field and information about the host organization (Justification of the relevance of the internship, according to the template)
- Memorandum/agreement of cooperation / a similar document between the participating organizations signed by authorized persons of both institutions²² (containing a commitment to perform exclusively non-economic activities of the technical/administrative worker for the duration of the internship, addressing any financial flows between the institutions concerned and their consent with the internship schedule).
- Updated Mobility/Internship/Hosting Calculator
- Activity report for each completed internship signed by the trainee and his/her immediate superior or their relevant proxy and a relevant representative of the foreign institution
- Travel order of the trainee without the related documents (transport tickets, etc.)
- Final Evaluation by the beneficiary of the experience sharing between the institutions within the implemented internships/hosting (signed by a statutory representative of the beneficiary)²³

	The second second second second second black set also fails a fails	
Documenting the output during	The on-the-spot inspection will check the following:	
the on-the-spot inspection	• Original of the memorandum/contract of cooperation / a similar document between the organizations involved	
	Original of the Activity Report	
	 Original of the Final Evaluation by the beneficiary of the experience sharing between the institutions within the implemented internships. 	
	Travel order of the trainee	

²² For each cooperation established, the beneficiary presents 1 memorandum regardless of the number of internships/ hosting between the two organizations.

²³ For each cooperation established, the beneficiary presents 1 Final Evaluation regardless of the number of internships/hosting implemented between the two organizations. The Evaluation is part of the Final Implementation Report.

Documents from which it will be possible to check
 Documents from which it will be possible to check the beginning and the end of the internship (attendance system, report from a business trip, etc.).

The person selected for participation in the Internship of technical and administrative workers in foreign research organizations and other entities engaged in research must meet, on the date of being sent to the mobility, all of the following conditions:

1. be a technical/administrative worker of the beneficiary

2. be an employee of the grant beneficiary at a minimum 0.5 FTE during the mobility implementation.

Number and name of the key activity:	6 Hosting foreign experts (administrative and technical workers) in a Czech research organization (organization of the applicant/beneficiary)
Objectives of the activity	The hosting of foreign experts is intended to exploit their potential in the Czech Republic, transfer know-how to a Czech research organization and to network foreign experts with Czech researchers. The main goal of this activity is to start a long-term cooperation of the supported Czech research organization with the foreign organizations involved and to internationalize the Czech research organization.
	The hosting may include the provision of practical training by a foreign worker to the target group of the project (learning by doing).
Description of the	Hosting a foreign expert in a Czech research organization.
implementation of the activity	The hosting may last from 2 to 60 working days.
	The supported worker will arrive to a Czech research organization on the basis of a memorandum or a similar document between a Czech and a foreign research organization.
	The foreign expert shares their knowledge and experience with employees of the Czech research organization.
	Moreover, it is possible to involve this expert in non-economic research activities in the organization and obtain from him an evaluation of existing procedures and possible recommendations for improvement (form of evaluation, supervision).
	The aim is to transfer know-how from a foreign organization, improve existing procedures and establish future cooperation.

	The aim of the activity (during the research project) is not the implementation of joint research aimed at creating joint research results.
	After completing the hosting, the foreign worker is obliged to draw up an Activity Report (see below) which will describe the content of the hosting, its duration and a final evaluation of the experience sharing.
Unit of activity	Cost of 1 working day of the hosting
Unit cost	The value of the unit cost is CZK 5,654 per working day.
	The total number of unit costs for 1 hosting is reported according to the number of working days of the hosting in the Czech research organization.
	The unit cost can be used by the beneficiary to cover the travel allowances (transfer to the destination, local travel costs), accommodation, meals + out-of-pocket expenses, costs of the consumables associated with the hosting, etc. At the same time, it is possible to use a part of the unit to cover the administrative and organizational costs of the organization associated with the implementation of the hosting.
Target group	The staff of research organisations and HEIs
Activity output	Implemented hosting a foreign expert in a Czech research organization
Documenting the output in the PIR	After the selection of the technical/administrative worker, the beneficiary shall provide in the PIR for the person selected for participation in the Hosting simple copies of:
	 Justification of the selection of the technical/administrative worker or a record of the selection procedure (signed by the statutory representative of the beneficiary)
	Professional CV of the technical/administrative worker
	Hosting schedule
	 Brief description of the benefits of the hosting, e.g. establishing new or expanding existing cooperation, gaining contacts, transferring knowledge, justification of the need for the internship with respect to the field and information about the host organization (Justification of the relevance of the internship, according to the model)
	 Memorandum/agreement of cooperation / a similar document between the participating organizations signed

	by authorized persons of both institutions ²⁴ (containing a commitment to perform exclusively non-economic activities of the technical/administrative worker for the duration of the hosting, addressing any financial flows between the institutions concerned and their consent with the hosting schedule).
	 Updated Mobility/Internship/Hosting Calculator Activity Report for each implemented hosting signed by the foreign worker and a relevant representative of the Czech research organization
	 Foreign travel order / other documents from which it will be possible to check the beginning and the end of the hosting of the foreign expert
	• Final Evaluation by the beneficiary of the experience sharing between the institutions within the implemented internships/hosting signed by the statutory body of the beneficiary ²⁵
Documenting the output during the on-the-spot inspection	 The on-the-spot inspection will check the following: Original of the memorandum/contract of cooperation / a similar document between the organizations involved Original of the Activity Report
	 Original of the Final Evaluation by the beneficiary of the experience sharing between the institutions within the implemented internships / practical trainings
	• Documents from which it will be possible to check the beginning and the end of the internship (contract, foreign travel order, attendance system, transport tickets, visa, etc.) ²⁶ .

Activity Report

The Activity Report is a document that must be drawn up by each person sent for mobility/ internship/ hosting.

²⁴ For each cooperation established, the beneficiary presents 1 memorandum regardless of the number of internships/ hosting between the two organizations.

²⁵ For each cooperation established, the beneficiary presents 1 Final Evaluation regardless of the number of internships/hosting implemented between the two organizations. The Evaluation is part of the Final Implementation Report.

²⁶ These are simple copies.

Persons sent for mobility draw up an Activity Report at a frequency of once a month²⁷ throughout the mobility. The researchers state in it what they worked on in the monitored period, whether the subgoals set by them were met, and specify the sub-goals for the next monitored period, what progress they made in their development, etc. It will also indicate any outputs or dissemination and other activities, such as participation in conferences/ seminars/ workshops (if implemented). Through the Activity Report, the researchers also inform about their absence, including dates and number of hours not worked, any interruption of the mobility or changes in the relationship of persons involved to the researcher, if relevant. The Activity Report is an annex to the PIR and it substantiates the implemented unit. An Activity Report template is available <u>here</u>. All the fields in the template must be completed inaccordance with the guidance in each area.

<u>Persons sent for an internship/hosting prepare an Activity Report for each completed internship</u> <u>or hosting. The Activity Report is an annex to the PIR and it substantiates the implemented unit.</u>

The minimum amount to cover the personnel costs of the researcher's mobility (including all obligatory expenditure) will be paid only in activities 1 - 4.

The minimum personnel costs must be paid directly to the researcher participating in the mobility.

During the implementation of the project, it is possible not to pay the personnel costs in the minimum amount for each unit of mobility (e.g. due to illness of the researcher, payment of a larger amount at the beginning to cover higher moving costs), but it is necessary to adhere to the minimum amount of monthly personnel costs of mobility on average **for the period reported** by the beneficiary in the PIR.

If the researcher is also granted the support tool "Support for the researcher's family", the beneficiary is obliged to report it in a similar way as the payment of minimum personnel costs.

The exact payment of the minimum personnel costs is checked at the on-the-spot inspection, where the beneficiary is obliged to provide specific documents proving the disbursement of the personnel costs.

MONITORING

Interim Project Implementation Report (including interim Payment Request)

Rules for reporting achieved units and their eligibility for activities 1 - 4

Within a unit, the costs for days worked, days of leave and incapacity for work are approved by the Managing Authority according to the table below. A maximum of 100% of the unit cost (including a support tool, if relevant) can be paid for one implemented unit. The unit is eligible in whole if at least 85% of the working time in the given calendar month is worked. In other cases, it is necessary to cut the unit on an aliquot basis.

The Managing Authority approves the eligible expenditure which corresponds to the unit cost for fully or partially achieved units, substantiated in the PIR and invoiced in the Payment Request.

The minimum part of a unit, which can be approved, is 1 day. Further rules for unit reporting are given

²⁷ If the mobility starts on a date other than the first day of the month, then only the worked part of the unit will be reported in the first month. Subsequently, the beneficiary will continue to report the unit every calendar month and, after completing the entire last unit, will report the remaining days that were not worked in the first unit. Activity Reports are drawn up for calendar months. Incomplete calendar months must also be reported.

in the following table.

Auxiliary table of rules for counting in time without performing work on mobility and for performing the mobility unit

Type of absence	Counted / not counted in the minimum duration ²⁸ / trivial support ²⁹ (300 hours) ³⁰	Counted / not counted in the period of mobility implementation (min. 3 months) ³¹	Counted / not counted in the performance of the unit ³² (including a support tool, if relevant)
Leave – aliquot part ³³	NO	YES	YES
Leave – above the aliquot part	NO	NO	NO
Incapacity for work up to 14 days (inclusive)	NO	YES	YES
Incapacity for work above 14 days up to 2 months (inclusive)	NO	YES	NO
Incapacity for work above 2 months	NO	NO	NO
Care for a family member up to 2 months	NO	YES	NO
Care for a family member above 2 months	NO	NO	NO
Obstacle to work for which the salary and compensation of salary/wages paid by the employer ³⁴ are due	NO	YES	YES
Absence without salary / salary (wage) compensation, e.g. unpaid leave	NO	NO	NO
Performance of telework for the duration of extraordinary me sures related to force majeure ³⁵	YES	YES	YES

²⁸ Relevant for activities 1 and 2.

²⁹ Relevant for activities 3 and 4.

³⁰ If at least 85% of the working time in a given month has been worked, the Mobility Calculator will report 150 hours in the part of trivial support.

³¹ Relevant for activities 1 to 4.

³² The performance of the unit means its eligibility. If at least 85% of the working time in the given calendar month is worked, the unit is eligible in whole.

³³ Compensation for a leave pertains to the period of the mobility implementation, i.e. if the mobility lasts 6 months, then a maximum of 6/12 of leave pertains to that period (in accordance with the valid legislation), i.e. an aliquot part.

³⁴ This includes benefits agreed in the employment/collective agreement (e.g. sick days) as they are considered work performance and are counted in the performance of the unit.

³⁵ These are extraordinary measures of the Government of the Czech Republic as well as extraordinary measures of the host country, transit countries or the country of residence of the researcher's family.

Type of absence	Counted / not counted in the minimum duration ²⁸ / trivial support ²⁹ (300 hours) ³⁰	Counted / not counted in the period of mobility implementation (min. 3 months) ³¹	Counted / not counted in the performance of the unit ³² (including a support tool, if relevant)
Implementation of mobilities "from home" due to force majeure	YES	YES	NO
Ordered Quarantine abroad at the time of participation in a conference/ seminar/ workshop	YES	YES	YES

Notice:

The inclusion of the period in the performance of the unit, which determines the eligibility of the unit costs in the given month, may not correspond to the inclusion of the period in the implementation of the mobility and the minimum duration of the mobility / trivial support. E.g. a period of incapacity for work longer than 14 days but shorter than 2 months is not included in the performance of the unit, is not included in the 300 hours of minimum duration / trivial support, <u>but is included in the mobility implementation period which must fit between the minimum and maximum implementation period (3 – 24 months)</u>. If the beneficiary implements at least 3 mobility units, it thereby meets both the rule of the minimum mobility implementation period (3 months) and the minimum duration/ trivial support (300 hours).

CHANGES TO THE PROJECT AND SUPPLEMENTATION OF THE PROJECT

In addition, the following changes cannot be made in projects under this call:

- Reducing the implementation period of the mobility below the minimum duration (applies to activities 1 and 2).
- Reducing the implementation period of the mobility below the minimum implementation period which is 3 months (applies to activities 1 to 4).
- Shortening the internship/hosting implementation below the minimum period of internship/hosting implementation, which is 2 working days (applies to activities 5 and 6).

Insignificant changes in the project

Insignificant material changes

The following applies to projects under this call:

Mobility can be interrupted for serious reasons for a strictly necessary period (the total mobility implementation period will be maintained, only spread out over time) which must not exceed 180 days (sum of all unplanned interruptions of the mobility/ internship/ hosting)³⁶.

³⁶ The sum of all unplanned interruptions of a given mobility does not include interruptions of mobility due to force majeure.

- Interruption of mobility in case of incapacity for work:
 - up to 2 months (inclusive) of the researcher's incapacity for work, the period of incapacity for work is included in the specified duration of the mobility, therefore, it is not necessary to submit a change request.
 - after 2 months of incapacity for work of a researcher, the period of incapacity for work is not considered to be the mobility implementation period with all the consequences, therefore, it is necessary to submit a substantial change request.

If approved, the beneficiary must indicate the interruption of mobility in the Activity Report (interrupted from-to), which is part of the PIR.

 A planned mobility interruption can be changed if all restrictions for a planned mobility interruption are respected.

Significant changes in the project

Substantial changes inducing an amendment to the Legal Act on Grant Award/Transfer

 Changes in mobilities/ internships/ hosting that lead to a reduction in the total eligible expenditure of the project.

Significant changes in the project

- Change of the researcher, complying with the conditions of the call in exceptional and duly justified cases.
- Change of the mentor during the mobility implementation (key activities 3). The new mentor must meet the above parameters set for a mentor.
- Interruption of mobility longer than 2 months due to incapacity for work.
- **Change of the host organization** only in exceptional and duly justified cases.

Possible changes associated with the spread of SARS-CoV-2 coronavirus³⁷:

The obligation of active participation / participation in a conference/ seminar/ workshop, etc. can be, due to extraordinary measures related to force majeure³⁸, also fulfilled in a distance form. Information on the form of implementation of the event will be provided in the monthly Activity Report.

Documenting the output at the on-the-spot inspection

In addition to the original documents proving the active participation / participation of the researcher in conferences/seminars/workshops, etc., it is necessary in the case of a distance form to provide a screenshot showing the number of participants, including the taskbar on the screen indicating the date and time of the screenshot, or another document from which the participation will be demonstrable.

³⁷ This part is relevant for projects with their Legal Act on Grant Award/Transfer including Methodological Letter No 1 concerning the Rules for Applicants and Beneficiaries – Specific Part.

³⁸ These are extraordinary measures of the Government of the Czech Republic as well as extraordinary measures of the host country, transit countries or the country of residence of the researcher's family.

If it is not possible to participate in an event due to extraordinary measures related to force majeure³⁹, it is possible to substitute the missed event with another event in the subsequent months of the mobility, or even in the return phase. In such case, however, the expenditure for this mobility can be claimed in the PIR/payment request only after the substitute event was attended.

Performance of telework in case of force majeure

For all activities (arrivals/departures), in the event of force majeure, it is possible to perform work remotely in accordance with the job description and employment contract.⁴⁰ However, the place of performing telework must be:

- in case of arrivals: a place in the Czech Republic
- in case of departures: a place abroad

After fulfilling the required conditions, the unit costs spent in that way can be reported in the PIR and claimed in the Payment Request. The hours/units worked that way can be included in the mobility implementation period and the minimum duration/ trivial support.

Performance of telework in incoming mobilities, if it is not possible to comply with the condition of the place of work in the Czech Republic

In **very exceptional cases** with regard to force majeure, it is possible **for arrivals to the Czech Republic** to temporarily replace the place of telework with a place abroad, usually in the country where the scientist resides permanently, but such period must not exceed the duration of the force majeure as well as 1/3 of the total mobility period (excluding interruptions).

For such exception to be accepted⁴¹, it is necessary to provide relevant documentation (or a reference to it) indicating clear intransgressible conditions that prevented these workers from returning to the Czech Republic (e.g. measures by countries other than the Czech Republic).

After meeting the required conditions, the units can be reported in the PIR and claimed in the Payment Request. The hours/units worked that way can be included in the duration of the mobility and in the minimum duration/ trivial support. During this period, it is not possible for the staff member to benefit from the support tool "Support for the researcher's family".

Implementation of mobilities "from home", i.e. from a place (state) other than where the mobility is to take place (in the case of departures usually in the Czech Republic, in the case of arrivals usually in the country where the scientist resides permanently)

Mobility can also be implemented in a way other than stated in the point "Performance of telework in case of force majeure" or in the point "Performance of telework in incoming mobilities".

In the case of force majeure, mobility can be implemented "from home", i.e. from a place (state) other

³⁹ These are extraordinary measures of the Government of the Czech Republic as well as extraordinary measures of the host country, transit countries or the country of residence of the researcher's family.

⁴⁰ Especially according to Section 317 of the Labour Code.

 $^{^{\}rm 41}$ It is submitted in the form of a change request in MS2014+.

than where the mobility is to take place (in the case of departures usually in the Czech Republic, in the case of arrivals usually in the country where the scientist resides permanently).

However, it is possible to implement mobility in this way only on a temporary basis (for a period not exceeding the duration of extraordinary measures related to the force majeure⁴² and at the same time not exceeding 1/3 of the total mobility implementation period), and during such implementation it will not be possible to claim unit costs for the mobility in a Payment Request. But the hours/units worked that way can be included in the duration of the mobility and in the minimum duration/ trivial support.

STATE AID

Support will be provided only to projects that do not constitute State aid within the meaning of Article 107(1) of TFEU.

Public financing in the area of education and research and development not constituting State aid

For the purpose of demonstrating the purely ancillary nature of the economic activities of research organizations supported from the Operational Programme Research, Development and Education within the meaning of point 20 of the Community Framework for State Aid for Research, Development and Innovation 2014/C/198/01 (hereinafter the Framework), the projects in this call must meet the following:

- The beneficiary / host organization can only be a research and knowledge dissemination organization pursuant to the Framework;

- in order for the support not to constitute State aid within the meaning of Article 107(1) of the Treaty on the Functioning of the European Union, it is necessary that the researcher / technical / administrative worker carries out only non-economic activity (i.e. activity defined in par. 19 of the Framework) in the beneficiary or hosting organisation;

- if the key activity also includes the return phase (relevant for activities 3 and 4), during which the experience gained abroad is transferred to the Czech Republic, it is necessary that during this return phase the researcher performs non-economic activities (any economic activity may only be carried out as complementary within the meaning of par. 20 of the Framework).

To substantiate the above conditions, it is necessary that:

a) together with the grant application, the applicant submits a *Declaration of compliance of the project* with the rules of State aid (a template of this annex is available in IS KP14+);

b) during the implementation, together with documenting the selection of the researcher, the beneficiary also provides the employment contract with the researcher (concerns activities 1 and 2), from which it must be clear that the researcher will perform exclusively non-economic activities at the beneficiary during the mobility;

c) during the implementation, together with documenting the selection of the researcher / technical/ administrative worker, the beneficiary provides

⁴² These are extraordinary measures of the Government of the Czech Republic as well as extraordinary measures of the host country, transit countries or the country of residence of the researcher's family.

a contract/ agreement/ memorandum of cooperation or a similar document between the beneficiary and the host research organization, which includes a condition that the researcher/ technical/ administrative worker shall not perform economic activity in the host organization (concerns activities 3, 4, 5 and 6);

(d) in the event that the sent researcher/ technical/ administrative worker also performs an activity for the beneficiary's organization for a part of their FTE during the mobility, the beneficiary must provide a statement during the implementation that the researcher/ technical/ administrative worker, in that part of the activity/FTE in the reporting period, performs either only non-economic activity or, if an economic activity is also performed, such economic activity is only ancillary (i.e. up to 20% of the working time within the part of FTE performed for the beneficiary). For inspection purposes, this fact can be demonstrated:

- either with an employment contract / job description of the researcher/ technical/ administrative worker, which must make it clear that the worker does not take part in an economic activity at the beneficiary, or

- factual records of activities (e.g. in the form of timesheets or similar records), if the researcher/ technical/ administrative worker's employment contract / job description with the beneficiary also allows the performance of economic activities. The beneficiary is obliged to provide this record to the Managing Authority for the purposes of random checks of fulfilling the condition of performing mostly non-economic activities;

e) during the implementation, the beneficiary submits an Activity Report with each Project Implementation Report, from which it must be clear that the researcher/ technical/ administrative worker performs exclusively non-economic activities in the host organization in the reporting period;

In the case of a failure to meet the conditions of the economic activities being only ancillary, the unit costs for the whole mobility/internship/hosting, during which the conditions were not met, are ineligible for financing from the Operational Programme Research, Development and Education.