

**Rules for Applicants and Beneficiaries**

**Specific Section**

Call “International Mobility
of Researchers – MSCA-IF II”

Operational Programme
Research, Development and Education

Programming period 2014–2020

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| **VERSION:** | 1 |
| **ISSUED BY:** | OP RDE Managing Authority |
| **VALID FROM:** | On the date of publication of the website of MEYS – OP RDE  |
| **EFFECTIVE FROM:** | 15 March 2018 |



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1. Chapter – Introduction

The specific section of the Rules for Applicants and Beneficiaries of the Call “International Mobility of Researchers – MSCA-IF II” supplements/adjust the Rules for Applicants and Beneficiaries – General Section. While the general section governs the rules for all Applicants and Beneficiaries of OP RDE, this specific section contains additional rules of the Call “International Mobility of Researchers – MSCA-IF II” in the relevant chapters.

The Rules for Applicants and Beneficiaries – Specific Section **Version 1** are issued together with the text of the Call as of the date when the Call is announced in IS KP14+ at latest. This version of the Rules is binding for all Applicants and Beneficiaries of the Call. The Managing Authority has the power to issue other versions or methodical letters containing additional conditions for Applicants and Beneficiaries. The Applicants and Beneficiaries are informed about the publication of these updates through the news on the website of MEYS in the EU Funds - OP Research, Development and Education section or through internal dispatches in IS KP14+.

The binding nature of relevant versions of the rules and subsequent project implementation are defined in Chapter 1 of the Rules for Applicants and Beneficiaries – General Section.

1. Chapter – Definitions of terms used

Covered in Rules for Applicants and Beneficiaries – General Section.

For the Call “International Mobility of Researchers – MSCA-IF II” the following terms are defined below:

**Czech Research Organisation/ Research Organisation in the Czech Republic**

It means a research organisation with the seat in the territory of the Czech Republic.

**Individual Fellowships**

These are individual scientific-research stays in Horizon 2020 – MSCA supporting education and professional growth of researchers. There are 2 modules:

* European Fellowships – scientific-research stays of researchers at renowned facilities across the EU or H2020 associated countries.
* Global Fellowships – scientific-research stays of researchers who have nationality of some of the EU member states or countries associated to H2020 in research organisations in third countries.

**Key Activity / Unit / Unit Cost / Expenditure / Output**

**Key Activity** means mobility including mobility preparation and mandatory return phase for departures from the Czech Republic. It is a comprehensive and interconnected set of activities aiming to achieve the defined outcome. Key activities may be supplemented for a support tool.

**Unit** means a basic part of the output (mobility), which the outcome can be divided into for the purposes of project administration and payment of the subsidy. Based on the performed units the output/result indicator bound for fulfilment is fulfilled.

**Unit Cost** shall mean financial valuation of the unit, i.e. average amount of costs specified by the aid provider required to carry out the unit, or fulfil the activity outcome. Unit valuation was performed by the Managing Authority of OP RDE and the unit will be issued by the European Commission in the delegated act. The term unit cost is used within the meaning of Section 14 (7) of Act No. 218/2000 Coll., on budgetary Rules and on amendment to certain other acts, as amended (hereinafter "Budgetary Rules”).

**Expenditure** shall mean unit cost equal to the number of the accomplished units.

**Key Activity Output** shall mean completed mobility of a researcher evidenced by required documents. Specific conditions for the accomplishment of the output and its documentation are specified in Chapter 5.2.4. The eligibility of Project Activities and in Chapter 11 “OP RDE Indicators”.

**Correction Coefficient**

Correction Coefficient is a dimensionless constant number set for each country separately reflecting the cost of living level in each country. Correction Coefficients are multiplied by the unit costs by the country of the researcher’s stay abroad (mobility). Correction Coefficients are taken from the rules of the European Commission for MSCA-IF and recalculated so that the basic initial value (1) of the correction coefficient would be the Czech Republic, not Belgium. The list of Correlation Coefficients is attached as Annex No. 3 of the Call.

**Short-term Secondment**

When implementing MSCA – Individual Fellowships projects, staff members are often sent out to additional partner organisations. Secondment must take place in the EU territory or in countries associated to H2020 and must contribute to the impact of the overall mobility of researchers. Up to 18 months of overall mobility of researcher, the secondment may take 3 months at maximum, over 18 months of overall mobility of researcher, it may take up to 6 months. For the time of secondment, the costs of mobility remain the same, i.e. the correlation coefficient does not change.

**Mobility**

Mobility means the work-stay of researchers abroad in the event of departures from the Czech Republic or work-stay of researchers in the Czech Republic in case of arrivals to the country. Each mobility means the stay of a person in the Czech Republic or abroad.

**Return Phase**

A Return Phase is a mandatory period of 6 months, during which the researcher who has used the mobility outside the Czech Republic must stay employed with the applicant/beneficiary institution with the place of work in the Czech Republic. The aim of the Return Phase is the knowledge transfer from abroad into the Czech Republic. The scope of working time in the return phase is not set. The Return Phase relates to mobilities carried out outside the Czech Republic (departures from the Czech Republic). The Return Phase also includes dissemination of mobility results (arrangement of at least one seminar, workshop, workshop etc. for employees/students of the Beneficiary).

**Junior Researcher**

A Junior Researcher shall mean a researcher, being a Ph.D. student or a person who was awarded Ph.D. degree or similar, at least 7 years before the date of submission of the grant application. The said period may be extended for the maternity and paternity leave period, long-term sickness (more than 90 days), care for a family member (more than 90 days), pre-attestation preparation and military training.

**Senior Researcher**

A Senior Researcher shall mean a researcher who was awarded Ph.D. degree or similar (equivalent to Level 8 according to ISCED) 7 and more years before the date of submission of the grant application.

1. Chapter – Legal basis and other underlying documents

Specified in the Rules for Applicants and Beneficiaries – General Section.

For the Call “International Mobility of Researchers – MSCA-IF”, the following documents are of particular importance:

* Communication from the Commission Framework for State Aid for Research and Development and Innovation 2014/C 198/01 (hereinafter the “Framework”)[[1]](#footnote-2);
* Article 14.1 of Regulation of the European Parliament and of the Council (EU) No. 1304/2013 of 17 December 2013 on the European Social Fund and repealing Regulation (EC) No. 1081/2006 followed by the regulation in the so-called EC’s delegated act, as amended.[[2]](#footnote-3)
1. Chapter –Contacts and Communication with the APPLICANT AND Beneficiary

Specified in the Rules for Applicants and Beneficiaries – General Section.

1. Chapter – Processes and Rules of a grant application, project evaluation and selection
	1. Announcement of Call for Proposals

The Call “International Mobility of Researchers – MSCA-IF II” is announced as a running call using a **single round evaluation model**. All data necessary for the evaluation are submitted by the Applicant in the grant application; this is followed by the process of approving the projects.

The projects that were submitted into Horizon 2020, Marie Skłodowska-Curie Actions – Individual Fellowships – European Fellowships (H2020–MSCA-IF–2017) in 2017 , were viewed positively (i.e. received more than 70%) by the European Commission, but could not be supported due to the lack of funds and were thus entered in the list of the so-called “no money project” will be supported.

The application submitted under OP RDE must not have a different content from the application approved in Horizon 2020 – MSCA-IF, including the same host organisation.

Additional information is given in the Rules for Applicants and Beneficiaries – General Section.

* 1. Preparation of Grant Application

Covered in Rules for Applicants and Beneficiaries – General Section.

5.2.1. Eligibility of Applicant

An eligible applicant is defined in the text of the Call - Chapter 4.

For this Call, only the conditions below are relevant.[[3]](#footnote-4)

The Applicant must comply with all of the criteria below arising from the definition of an organisation for research and knowledge dissemination according to the Framework and must ensure that it will meet such conditions for the whole time of the project implementation.

1. The primary objective of an Applicant is to independently conduct fundamental research, industrial research or experimental development, or to widely disseminate the results of such activities by way of teaching, publication or knowledge transfer.
2. Enterprises (i.e. entities engaged in economic activities) which can exert a decisive influence upon the Applicant, for example in the quality of shareholders or members, may not enjoy preferential access to the results generated by the Applicant.
3. Where such entity also pursues economic activities, the financing, the costs and the revenues of those economic activities must be accounted for separately.
4. The obligations referred to in (a) to (c) must be incorporated in the internal guidelines of the applicant (e.g. Articles of Association, formation deed) no later than on the date of submission of the grant application.

**Documents required to verify the eligibility of an applicant:**

When submitting the application, the documents confirming formal setting for meeting the requirements arising from the definition of an organisation for research and knowledge dissemination according to the Framework (definition of main activity, separation of economic and non-economic activities, elimination of the impact of enterprises etc.). These documents may include, for example: formation deed, articles of association, memorandum of association, formation charter, etc. These documents are to be submitted only by Applicants that meet the definition of a research and knowledge dissemination organisation according to the Framework, but are not a public higher education institution, state higher education institution conducting research, or a public research institution or entities not listed on the list of research organizations led by the MEYS by the date of submitting the application.

The case the Applicant is listed on the list of research organizations led by the MEYS by the date of submitting the application, is sufficient to prove that the definition of a research organization and the dissemination of knowledge under the Framework is met.

An eligible Applicant is also obliged to meet all the following criteria:

* Applicant type (is included in the list of eligible applicants in the Call);
* Pursuant to Section 14 (3) letter e) of the budgetary rules, the Applicant must identify an ownership structure. The Applicant will identify the ownership structure in the grant application in the tab Project Entities/Person of the Entity. The Applicant will submit identification details of:
* Any persons acting in its name, stating whether they act as its governing bodies or under a power of attorney;
* Any persons with a share in this legal person;
* Any third persons in which the applicant/partner has a share, and the amount of that share.
* The Applicant other than the legal person under public law is obliged to accompany the grant application with a list of its beneficial owners using the annex demonstration of Ownership Structure (please see Chapter 18.10.) in accordance with the provisions of Section 4(4) of Act No. 253/2008 Coll., on certain measures against the legalization of proceeds from crime and financing of terrorism, as amended (hereinafter the “AML Act”). If such beneficial owners cannot be identified under the AML Act because a particular legal form of the beneficiary is not expressly provided in the AML Act, the Applicant shall provide, using the annex demonstration of Ownership Structure, information on the natural person or persons working as the applicant’s top managers.

In connection with the demonstration of the ownership structure and in order to avoid any potential conflict of interest, the Applicant must, at the request the OP RDE or other entities authorised to the inspection (such as PCA, AA, EC or ECA), submit documents proving the facts specified on the tab Project Entities / Entity Persons in the Annex “Demonstration of Ownership Structure”.

The Applicant that fails to demonstrate its ownership structure does not meet the conditions to become an eligible applicant.

* The Applicant is not subject to insolvency proceedings, private enforcement proceedings, or liquidation;
* The applicant meets the conditions of absence of debt with State[[4]](#footnote-5) and self-government[[5]](#footnote-6) authorities, tax office and health insurance companies and the Czech Social Security Administration (i.e. with the Czech Republic does not have enforceable tax arrears in the tax records, has no insurance arrears or public health insurance penalties, or on social security and contribution to the state employment policy). The fact that the applicant has no insurance arrears or public health insurance penalties is documented in relation to those health insurance companies in the Czech Republic where the applicant's employees are registered in the form of the Proof of the absence of debt. In the case of other health insurance companies for which its employees are not registered, the applicant shall prove this fact by affidavit.
* The Applicant has a clean criminal record;
1. The applicants must, through an annex to the grant application, demonstrate that the **annual turnover of the organization** is at least 30% of the amount of the total expected eligible project expenditures specified in the grant application. The condition for achieving the required turnover must be met by the Applicant for the last two consecutive closed accounting periods lasting 12 months (that exist), for which the applicant was required to file a tax return, and which precede the submission of the application. The Applicant shall demonstrate this by submitting the Profit and Loss Statement for the above-mentioned accounting periods.

Annual turnover is defined in Section 1d (2) of Act No. 563/1991 Coll., on Accounting, as amended: “For the purposes of this Act, the annual aggregate net turnover means the amount of revenue net of sales discounts, divided by the number of commenced months of the accounting period multiplied by twelve. Publicly beneficial payers[[6]](#footnote-7) as defined in Section 17a of Act No. 586/1992 Coll. on the Income Tax Act, as amended, shall include the annual aggregate of the net turnover of the overall activity, i.e. both the main and economic activity. Taxpayers who keep tax records shall indicate the total of all revenues in the taxable period, or the period for which they filed the last income tax return.

H. The Applicant must, using the Annex to the Grant Application, demonstrate that it will adhere to the principles given in the Commission Recommendation of 11 March 2005[[7]](#footnote-8), i.e. the Charter for Researchers, Code of Conduct and Reception of Researchers and the European Code of Conduct for Research Integrity.

5.2.2. Territorial Eligibility of OP RDE Projects

The programme area for less developed regions is designated for projects under this Call. However, in this Call, it is possible to benefit from the exemption under Article 13 of the Regulation on ESF, i.e. it is also possible to implement projects outside the programme area (i.e. in the entire territory of the Czech Republic and the EU and also outside the EU). The place of project implementation and project implementation impact location is determined **as a total for all implemented mobilities**.

The rates of financing between more and less developed regions are **fixed** and are given in Chapter 8.1.5. The financing rate across programme areas will be filled by the Applicant in the grant application in the tab Specific Objectives under Chapter 8.1.5.

5.2.2.1  Eligible Place of Operation Impact

In this Call, the potential impact is on less developed regions (regions except for the Capital City of Prague), or on both regions the so-called more developed region (Capital City of Prague) and less developed region simultaneously. In the grant application, the Applicant will determine the territory where the project activities will be performed for the benefit of the target group, i.e. regions benefiting from the project implementation.

For each mobility (project) the project impact location **is always in the territory of the Czech Republic.:**

* In the event of departures, the place of work of employees in the Return Phase is decisive for the determination of the impact location.
* In the event of arrivals of staff from abroad, the place of work is in the Czech Republic, i.e. mobility implementation.

Possible alternatives:

* In case of impact on **less developed regions**, the place of work of an employee (all employees) in the Return Phase, and foreign staff (all foreign staff) must be in less developed regions.
* If the place of work of any employee in the return phase or foreign staff member in the Czech Republic is in the more developed region (i.e. Capital City of Prague), then there is a simultaneous impact on **less and more developed regions**.

During the project implementation, the Applicant is not obliged to document other than the above-mentioned relation of the target group to less o more developed regions.

5.2.2.2 Eligible Place of Implementation

The project implementation may take place in the whole territory of the Czech Republic, both in and outside the EU. The place of project implementation means any place where the Mobility and Return Phase will take place.

However, in the grant application (in IS KP14+) the territory outside the Czech Republic cannot be defined in the “implementation territory” tab. Therefore, in the event of Mobilities abroad, the Applicant will only select the place of implementation of the Return Phase in the “implementation territory” tab as the implementation territory (municipality (LAU1), ORP or district (LAU2) will suffice), and will give any locations abroad where the Mobilities will take place in the description of the supported activity.

5. 2. 3. Target Group Eligibility

Specified in the Rules for Applicants and Beneficiaries – General Section.

5.2.4. Eligibility of Project Activities

Specified in the Rules for Applicants and Beneficiaries – General Section.

A separate key activity of Project Management is not relevant for this Call and may not be included in the Application.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II”:

In the application, the Applicant will define individual key activities according to the supported activities of the Call; each supported activity may be performed several times (more key activities), or not at all. The support tool, if selected, is only a part of the key activity and may not constitute a separate key activity.

The key activities include individual Mobility, Return Phase and application of the support tool. The Applicant/Beneficiary is obliged to initiate, within 6 months from the date when the legal act on the grant award/transfer is issued, at least one key activity (mobility), i.e. to initiate the physical implementation of the project.

The time between the issuance of the legal act and start of Mobilities can be used for the preparation of Mobilities.

Each key activity is always composed of one Mobility positively evaluated by the European Commission in Horizon 2020, Marie Skłodowska-Curie Actions – European Fellowships in 2017, and may include a support tool, for departures from the Czech Republic it also includes a mandatory Return Phase. In the grant application, the Applicant (in IS KP 2014+ Key Activities tab), will state the number of Mobilities to be carried out and will give more details of each Mobility, particularly:

* Mobility type (departures/arrivals – relation to the supported activity of the Call),
* Mobility duration (length of Mobility must correspond to Horizon 2020 – MSCA – IF project),
* relation to MSCA application – Mobility description (must be in line with WP given and approved in Horizon 2020 – MSCA – IF project, including the supervisor),
* Information of the application of the support tool,
* for departures from the Czech Republic, the destination.

The activity can only be performed from 12 to 36 months, of this **the Mobility implementation period** (i.e. net work-stay of the researcher, in case of stays with family) **must not be shorter than 12 months and longer than 24 months**. Exceptionally, the Mobility can be suspended – please see Chapter 7.2.

When implementing MSCA – Individual Fellowships projects, the researchers may perform secondment in line with the project submitted in Horizon 2020. Secondment must take place in the EU territory or in countries associated to H2020 and must contribute to the impact of the overall mobility of researchers. Up to 18 months of overall mobility of the researcher, the secondment may take 3 months at maximum, over 18 months of overall mobility of the researcher, it may take up to 6 months. For the time of secondment, the costs of mobility remain the same, i.e. the Correction Coefficient does not change.

**Project Structure**

The applicant composes the project of individual key activities based on the supported activities of the Call (and the support tool):

**Supported Activity No. 1:** Support of the “no money” MSCA Projects - Arrivals to the Czech Republic

**Supported Activity No. 2:** Support of the “no money” MSCA Projects - Departures from the Czech Republic

**The name of the key activity is formed by the applicant and must have a mandatory structure: number of the supported activity according to the call – first name and surname of the researchers according to MSCA project.**

*For example: Key activities aimed at the supported activity No. 2 (departures): „2 – Karel Novák“,*
*„2 – Milada Jerolímová“.*

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**Overview of Activities and Their Interpretation**

|  |  |
| --- | --- |
| **Number of the supported activity according to the call** | **1** |
| **Title of supported activity** | **Support of the “no money” MSCA Projects - Arrivals to the Czech Republic** |
| **Objectives of activity implementation** | The objective of the activity is the transfer of international experience into the research organisation(s) through the involvement of quality researchers from abroad into research teams in the Czech Republic. The research institutionalisation is a long-term objective. |
| **Description of activity implementation** | The support is intended to perform individual scientific-research stays of researchers in the Czech Republic – Mobilities (Individual Fellowships, European), the grant applications of which were positively evaluated in Marie Skłodowska-Curie Action programme, but were not supported due to limited allocation amount. The researcher is a full-time employee in the Czech research organisation (1,0)[[8]](#footnote-9). The activity is aimed at Mobilities performed in the Czech research organisation by the researcher (please see the definition of terms, Chapter 2) from abroad.The researchers must actively[[9]](#footnote-10) participate in a conference / seminar / workshop etc., organised by the institutions of the Beneficiary, at least once during each 6 months of the mobility duration. (Mobility duration of 12 months – at least two participations in such event, mobility duration of more than 12 and a maximum of 18 months - at least three participations in such events, mobility duration of more than 18 and a maximum of 24 months - at least four participations in such events.) |
| **Activity unit** | 1 calendar month of employment of the researcher in the Czech research organisation (30 days).  |
| **Unit cost** | The value of unit cost is **CZK 156,944** (Senior Researcher) **or CZK 122,895** (Junior Researcher).The minimum amount that must cover the personal costs of a researcher mobility (including all mandatory expenses[[10]](#footnote-11)) is CZK 118,671 (Senior Researcher) or 84,622 (Junior Researcher). To be inspected by the Managing Authority in the employment-legal document and/or similar document during the monitoring following the selection of the researcher and subsequent payment as part of the on-site inspection, must be in accordance with the law.The maximum amount that the beneficiary can use to cover the administrative and organizational costs associated with the implementation of mobility is CZK 38,273. |
| **Target group** | Staff of research organisations  |
| **Outputs of activity** | The performed mobility of the researcher in the research organisation in the Czech Republic. |
| **Documenting the project PIR** | Monthly report of activities for each performed activity unit (for sample please see [here](http://www.msmt.cz/strukturalni-fondy-1/prehled-vzoru-prilohy-monitorovacich-zprav)).  |
| **Documenting the outcome during the on-site inspection** | During the on-site inspection, the following will be inspected, including but not limited to:* Fulfilment of the activity objectives via an interview with the researcher
* Attendance
* Original copy of employment-legal documents including any other documents that would imply that the researcher is entitled to the provision of a minimum amount from the unit cost value
* Documentation of payments to the researcher
* Original copy of Activity Reports
* Original copy of Mobility Schedule
* Original copy of documents demonstrating the participation of the researcher at conferences/seminars/workshops etc.

Any other original copies of documents presented to demonstrate outcomes in project PIR. |
| **Output indicator** | 2 04 03 Number of services provided by newly incoming researchers from abroad*Note: Each Mobility represents value 1 of the output indicator, indicator values add up in the projects and form a target value.**Documentation of the output indicator is identical to the documentation of the activity output.* |

The supported activity No. 1 fulfils the result project indicator 2 04 15. Indicator 5 43 10 “Number of Supported Cooperation” must be selected if secondment is part of the mobility. For more information about the setting of target values, monitoring and documentation please see Annex No. 1 of the Call and Chapter 11.3.

|  |  |
| --- | --- |
| **Number of the supported activity according to the call** | **2** |
| **Title of supported activity** | **Support of the “no money” MSCA Projects - Departures from the Czech Republic** |
| **Objectives of activity implementation** | The objective of the activity is to support quality researchersfrom the Czech research organisation in their professional growth through gaining experience abroad. The development of the dispatching organisation is a long-term objective. |
| **Description of the activity** | The support is intended to perform international scientific-research stays - Mobilities of researchers (see the definition of terms, Chapter 2), the grant applications of which under Individual Fellowships, European were positively evaluated in Marie Skłodowska-Curie Action programme, but were not supported due to limited allocation amount. The researcher is employed in the organisation of the Beneficiary for the whole time of Mobility and Return Phase performance. The researcher is a full-time employee during the mobility performance (1,0)[[11]](#footnote-12).The researchers must participate in a conference / seminar / workshop etc., at least once during each 6 months of the mobility duration. It may be an event organised by other than host institution or if the event is organised by the host institution, it must be an international[[12]](#footnote-13) event. (Mobility duration of 12 months – at least two participationa in such event, mobility duration of more than 12 and a maximum of 18 months - at least three participations in such events, mobility duration of more than 18 and a maximum of 24 months - at least four participations in such events.)The activity includes a mandatory Return Phase of 6 months.The mobility can be performed both in and outside the EU (only countries associated to H2020). |
| **Activity unit** | 1 calendar month of a scientific-research stay abroad (30 days). |
| **Unit cost** | The initial value of unit cost (at the correction coefficient of 1.0) is **CZK 156,944** (Senior Researcher) **or CZK 122,895** (Junior Researcher).The unit cost of the performed unit is determined by the sum of the amount to cover the personal costs of the researcher mobility and the amount to cover the administrative and organizational costs (see below). The amount of the correction coefficient needed to calculate the amount to cover the personal costs of a researcher mobility is shown in Annex No. 3 of the Call. The minimum amount that must cover the personal costs of a researcher mobility (including all mandatory expenses[[13]](#footnote-14)) is calculated as follows: [(CZK 102,834 x correction coefficient) + 15,837] – Senior researcher[(CZK 68,785 x correction coefficient) + 15,837] – Junior researcherTo be inspected by the Managing Authority in the employment-legal document and/or similar document during the monitoring and subsequent payment as part of the on-site inspection, must be in accordance with the law.The maximum amount that the beneficiary can use to cover the administrative and organizational costs associated with the implementation of mobility) is calculated as follows: CZK 38,273.  |
| **Target group** | Staff of research organisations  |
| **Outputs of activity** | The performed Mobility of the researcher in the foreign host organisation including the completed Return Phase. |
| **Documenting the project PIR** | Monthly Report of activities for each performed activity unit (for sample please see [here](http://www.msmt.cz/strukturalni-fondy-1/prehled-vzoru-prilohy-monitorovacich-zprav)*).* |
| **Documenting the output during the on-site inspection** | During the on-site inspection, the following will be inspected, including but not limited to:* Fulfilment of the activity objectives via an interview with the researcher
* Original copy of employment-legal documents including any other documents that would imply that the researcher is entitled to the provision of a minimum amount from the Unit Cost value
* Documentation of payments to the researcher
* Original copy of Activity Reports
* Original copy of Mobility Schedule
* Original copy of documents demonstrating the participation of the researcher at conferences/seminars/workshops etc.

Any other original copies of documents presented to demonstrate outputs in the project PIR. |
| **Indicators**  | 2 08 00 “Number of Supported Researchers and Academics!And also, the output indicator, the so-called milestone 6 00 00 “Total Number of Participants” (to be reported once the small-scale aid is reached, please see Chapter 11.3).*Note: Each mobility represents value 1 of the output indicator, indicator values add up in the projects and form a target value.* *Documentation of the output indicator is identical to the documentation of the activity output.* |

The supported activity No. 1 fulfils the result project indicators 2 08 10 and 5 43 10, for more information of the setting of target values, monitoring and documentation please see Annex No. 1 of the call and Chapter 11.3.

**Any potential research outputs conceived during mobility performance must be published in an Open Access[[14]](#footnote-15) form.**

**Mandatory Return Phase of Mobilities**

For the supported Activity No. 2 *“Support of the “no money” MSCA Projects - Departures from the Czech Republic*, a mandatory Return Phase of the Mobility of 6 months for each and every mobility is specified. The objective of the Return Phase is the transfer of knowledge gained during the Mobility in the organisation of the Beneficiary. The Return Phase must be started without undue delay following the completion of the Mobility of the researcher is a part of the project implementation and must be included in the key activity schedule. During the Return Phase, the supported researcher must be involved in research activities of the Beneficiary. The Return Phase also includes dissemination of mobility results to employees/students of the Beneficiary (at least one seminar, workshop, workshop etc.). **The Return Phase is performed exclusively by the researcher who took part in the mobility, at least for the duration of small-scale aid, please see Chapter 11.3.1.** Each return phase fulfils the result project indicator 2 08 10.

Following the completion of the Return Phase, the researcher must prepare Activity Report in the Return Phase (for sample see [here](http://www.msmt.cz/strukturalni-fondy-1/prehled-vzoru-prilohy-monitorovacich-zprav)).

**Activity Report**

The Activity Report is a document that must be prepared by each person on the mobility with a frequency of once a month[[15]](#footnote-16) during the whole time of the mobility. The researcher will state what he/she worked on in the monitoring period, whether partial goals set by him/her were accomplished and will specify other partial goals for the next monitoring period, how he/she has progressed in his/her development and so on. In addition, he/she will state any outputs or dissemination or other activities, such as participation in conferences/seminars/workshops (if organised). Through the Activity Report, the research will also inform of any potential Mobility suspensions or changes of relationships of person to the researcher, if relevant. In addition, the report will state the total monthly fund of working hours, number of the hours worked in the given month which is not included in the small-scale aid / the minimum duration of mobility and total number of eligible hours in the given month. The Activity Report is part of the Project Implementation Report (project PIR) and serves to document the performed activity units. A sample of the Activity Report is available [here](http://www.msmt.cz/strukturalni-fondy-1/prehled-vzoru-prilohy-monitorovacich-zprav). All fields shown in the template must be filled in, in accordance with the guiding information in each area.

**Activity Report in Return Phase**

The Activity Report in Return Phase is a document prepared by the researcher following the completion of the Return Phase. The report must include a description of activities performed by the researcher during the Return Phase. Among other, the description should focus on the transfer of experience gained during the mobility into the Beneficiary’s organisation and dissemination of Mobility results through the arrangement of seminars, workshops etc. The Activity Report in Return Phase will also include information regarding the ratio of the performed economic and non-economic activities in the return phase. The Activity Report in Return Phase is intended to document the activity output in the Project Implementation Report (project PIR). A template of the Activity Report in Return Phase is available [here](http://www.msmt.cz/strukturalni-fondy-1/prehled-vzoru-prilohy-monitorovacich-zprav). All fields shown in the template must be filled in, in accordance with the guiding information in each area.

**Support Tool:**

|  |  |
| --- | --- |
| **Support tool name** | **Support for the Researcher's Family** |
| **Objectives of instrument implementation** | The aim is to align work and private life of researchers. |
| **Description of the instrument** | It is a support tool for the development of human resources in research while taking into account personal needs of the researcher.The support tool is intended to ensure a contact of the researcher with his/her family members. The family member is defined as husband/wife or an equivalent relationship legally defined in the country where it was formalised, or own dependent child or dependent child entrusted into care. |
| **Documenting the entitlement to the support tool** | A statutory declaration demonstrating the relationship between the researcher and another person. Any changes in the relationship of such persons with the researcher will be stated by the Beneficiary in the Activity Report. |
| **Support tool unit** | 1 calendar month. The number of completed units is set according to the number of calendar months, in which mobility units of the same key activity were performed. The units where the conditions for the provision of support under the support tool were met for the whole calendar month will be included. |
| **Unit cost** | The initial value of unit cost is **CZK 13,197**. The Unit Costs are set regardless of the number of family members and without the application of the Correction Coefficient. The claimed funds for the support tool of the given mobility must be provided for the benefit of the researcher. |
| **Documenting units in the project PIR** | The unit is deemed documented when the mobility unit to which it is related is documented. |
| **Target group** | Staff of research organisations  |
| **Support tool output** | The performed mobility of the researcher, which includes the support tool. |
| **Indicators**  | No independent outcome or result indicator is set for the support tool.  |

5. 2. 5. Project Budget and Financial Plan

The project budget is included in Chapter 1.1. “Support for Reserve MSCA Projects - Arrivals to the Czech Republic” and Chapter 1.2 “Support for Reserve MSCA Projects - Departures from the Czech Republic” representing each of the supported activities under the Call. Both chapters include sub-chapters “Mobility MSCA” and “Support of Researcher’s Family[[16]](#footnote-17)”, in which the Applicant creates individual **budget items** of the project. If support tool is not used together with the Mobility, the relevant sub-chapter of the project budget entitled “Family Support“ will be zero in the budget. The sum of costs of mobility and costs of support tool represents total eligible expenditures of the key activity.

The titles of the **budget items** are identical with the names of each of the key activities, only items in sub-chapter “Support of Researcher’s Family” will be designated with “R” (this symbol will allow the Beneficiary to identify the support tool when preparing project PIR (Project Implementation Report)/RfP (Request for Payment) as part of the project monitoring).

**The project budget item** is defined by the number of units and Unit Costs once the Correction Coefficient is taken into account. Their product represents the total cost of the given item of the project budget (“*total amount*”), i.e. the costs of Mobility or cost of support tool. Only one type of unit and one value of the unit costs can be budgeted for a single project budget item. I.e. Unit Costs with different Correction Coefficient, or different mobilities cannot be combined under a single project budget item.

The costs of Key Activities – individual Mobilities and support tools (*according to the column “P” -Mobility Calculators*) will be given by the applicant in the grant application in the costs overview field.

The Applicant chooses costs according to the senior or junior position of the researcher. If the researcher falls neither under the junior or senior position, he/she cannot be supported under this call.

**Total eligible expenditure** is a sum of costs for each of the Key Activities. During the project implementation, the total eligible expenditure is set as a sum of total costs of each of the Key Activities and project budget chapters “Unused funds” however only costs of Key Activities can be drawn and paid. The total eligible expenditure can be calculated before the drafting of the project budget using the so-called Mobility Calculator which will be made available at MEYS website.

The third sub-chapter of the project budget 1.1 and 1.2 is formed by **Unused Funds**. This sub-chapter serves exclusively to transfer funds that can no longer be used for the performance of the Key Activity due to any changes made to the Mobility (unplanned partial unit completion is not deemed a change). **In this sub-chapter, zero must be given when drafting the budget as part of the grant application!** The funds are transferred to this sub-chapter by the Beneficiary when changes to the Mobility are made, so that individual items (of Mobilities, support tools) always correspond to the description of Mobilities. The Beneficiary may continue to use the funds in this sub-chapter. This sub-chapter has only an accounting nature (usually with one item, number of units 1 and predefined indefinite/variable value). **The funds cannot be directly absorbed from the item of this sub-chapter**, first they must be assigned to a particular mobility/activity and then submitted for billing as part project PIR (Project Implementation Report)/RfP (Request for Payment).

**Budget Illustration - Call “International Mobility of Researchers – MSCA-IF II”:**

|  |  |
| --- | --- |
| 1. | Total eligible expenditure |
| 1.1. | 1 - Support for Reserve MSCA Projects - Arrivals to the Czech Republic |
| 1. 1. 1. | 1 – Mobility MSCA - arrivals to the Czech Republic (total CZK) |
| 1.1.1.1 | 1 – First name and surname of scientist No. 1 |
| 1.1.1.2 | 1 – First name and surname of scientist No. 2 |
| 1.1.1.3 | 1 – First name and surname of scientist No. 3 |
| 1.2.1. | R – 1 – Support of Researcher’s Family (total CZK) |
| 1.1.2.1 | **R** – 1 – First name and surname of scientist No. 1 |
| 1.1.2.2 | **R** – 1 – First name and surname of scientist No. 2 |
| 1.1.2.3 | **R** – 1 – First name and surname of scientist No. 3 |
| 1.1.3. | 1 – Unused Funds |
| 1.2. | 2 - Support for Reserve MSCA Projects - Departures from the Czech Republic |
| 1.2.1. | 2 – Mobility MSCA - Departures from the Czech Republic (total CZK) |
| 1.2.1.1 | 2 – First name and surname of scientist No. 4 |
| 1.2.1.2 | 2 – First name and surname of scientist No. 5 |
| 1.2.2. | R – 2 – Support of Researcher’s Family (total CZK) |
| 1.2.2.1 | **R** – 2 – First name and surname of scientist No. 4 |
| 1.2.2.2 | **R** – 2 – First name and surname of scientist No. 5 |
| 1.2.3. | 2 – Unused Funds |
| 2. | Ineligible expenditure |

\* Grey lines (chapters, sub-chapters are preset in IS KP 14+; white lines (items) are created by the applicant.

**Unit cost and unit**

Units for each of the supported activity are defined in Chapter 5.2.4.

The amount of the Unit Cost is set for each supported activity, respectively Mobility, in the budget for each Mobility, “unit price” field already includes the amount of the Unit Cost after the application of the Correction Coefficient. Such unit costs correspond to the full (100%) unit completion. Similarly, budget units and Unit Costs for the support tool will be budgeted. The Unit Costs and total costs of Mobility, support tool and Key Activity can be calculated using the Mobility Calculator. For more information on unit completion and payment of Unit Costs please see Chapter 8.7.1.

5.2.5.1. Financial Milestones

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

5. 2. 6. Cost Benefit Analysis (CBA)

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

5.2.7. Construction work

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

5.2.8. Comment on the budget

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

* 1. Receipt of Grant Applications

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. Project Approval Stage

The approval stage is the stage between the grant application receipt closing date to the issue of the legal act on the grant award/transfer.

Following the receipt of the grant application on the basis of the published call for application submission, every grant application undergoes the approval process with observed principles of transparency, equal approach and non-discrimination. The process of approval of grant applications under these calls includes the check of eligibility and formal requirements which is performed by internal evaluators of OP RDE MA.

For the Call “International Mobility of Researchers – MSCA-IF II”, the following evaluation model is specified:

**Phases of the approval process, incl. partial time limits[[17]](#footnote-18) (WD – working day):[[18]](#footnote-19)**

5.4.1. Check of Eligibility and Formal Requirements

Specified in the Rules for Applicants and Beneficiaries – General Section.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II”:

The check of eligibility and formal requirements is to be ensured by internal evaluators of OP RDE MA in CSSF14+. The check of eligibility and formal requirements is to be completed within 30 working days from the receipt of grant applications.

The criteria of the check of eligibility and formal requirements, including the description of the evaluation method, form a separate annex to the Call - Annex No. 2 “Evaluation Criteria”). The criteria have an exclusionary function, they are evaluated as a YES/NO, i.e. pass/fail (or irrelevant for the project). The criteria for the check of eligibility and formal requirements are divided into correctable (i.e. the applicant may make additions during the approval process at the request of the MA), and non-correctable (i.e. non-compliance always means exclusion from the approval process without the Applicant being allowed to make any additions).

If the Applicant fails to comply with any of the correctable criteria as part of the check of formal requirements, the Applicant will be requested to add the missing information through IS KP14+ within the period of 10 working days from the date on which the request is delivered. If, at the request of the MA to add data, the applicant fails to add the missing information/documents (sufficiently as required by the MA and within the time limit), the grant application will be excluded from the approval process. Failure to meet any of the non-correctable criteria leads to the application being excluded from the approval process.

With regard to this call, the check of eligibility and formal requirements is the last phase of the grant application evaluation (For more information, please see Chapter 5.5. and Chapter 6.3.).

5.4.2. Objective Evaluation

This chapter is not relevant for the Call “International Mobility of researchers – MSCA – IF”. The objective evaluation was provided as part of Horizon 2020 programme.

5.4.3. Final verification of eligibility

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

5.4.4. Risk Analysis

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

5.4.5. Project Selection

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”. The list of recommended and non-recommended projects for support is made by OP RDE MA based on the fulfilment of criteria of eligibility and formal requirements (Please see Chapter 5.4.1).

5.4.4. Approval of the EC Major Projects

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

* 1. Method of Notification of the Approval Process Results to the Applicant

Specified in the Rules for Applicants and Beneficiaries – General Section.

1. Chapter – Processes and rules for the issue of a legal act on the GRANT AWARD/transfer
	1. Award of Grant to the Applicant

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. Forms of Allocation of Funds

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. Notification of Approval of Grant Application from OP RDE

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. Documents Required to Issue a Legal Act on the Grant Award/Transfer

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

* 1. Approval of Grant Award

Specified in the Rules for Applicants and Beneficiaries – General Section.

In addition, with regard to the Call “International Mobility of Researchers – MSCA-IF II”, the documents required to issue a legal act on the grant award / transfer are submitted by the Applicant in the form of annexes to the grant application (see Chapter 18. Annexes). Before issuing the legal act on the grant award/transfer, the Applicant may be required to provide additional documents related to project changes until the time when the grant application is submitted (For more information, see Chapter 7.2).

1. Chapter – Processes and rules of project management
	1. Monitoring

Specified in the Rules for Applicants and Beneficiaries – General Section.

7.1.1. Interim Project Implementation Report (including preliminary payment request)

Specified in the Rules for Applicants and Beneficiaries – General Section.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II”:

**Deadlines for the Submission of Project Implementation Report /Request for Payment**

The Beneficiary is obliged to submit the first and each interim Project Implementation Report (hereafter “PIR”) and Request for Payment (RfP) including any required annexes within 20 working days following the expiry of the preceding monitoring period, where the interval of the monitored period for the projects of this call is set as follows:

|  |  |  |
| --- | --- | --- |
|  | **Projects with a duration of 12 months** | **Projects with duration over 12 months** |
|  | interval of the first monitoring period | interval of the second/next monitoring period | interval of the first monitoring period | interval of the second/next monitoring period |
| **Projects with the commence of the physical implementation of the project before the date of the issuance of the legal act on the granting / transfer of aid** | period from the actual date of the physical implementation of the projectto 3 months \*after the date of issuance of the legal act on the granting / transfer of the aid | 3 months, counted from the end of the first / previous reference period | period from the actual date of the physical implementation of the projectto 6 months \*after the date of the legal act on the granting / transfer of the aid | 6 months, counted from the end of the first / previous reference period |
| **Projects with the commence of the physical implementation of the project after the date of the issuance of the legal act on the granting / transfer of aid** | 3 months \*beginning on the date of commencement of the physical implementation of the project referred to in the legal act on the granting / transfer of aid [[19]](#footnote-20) | 3 months, counted from the end of the first / previous reference period | 6 months \*beginning on the date of commencement of the physical implementation of the project referred to in the legal act on the granting / transfer of aid [[20]](#footnote-21) | 6 months, counted from the end of the first / previous reference period |

\* Note: The last day of the first reference period from which the deadline for submitting the first continuous PIR project and the RfP is subsequently set, is the last calendar day of the last month in this reference period. That is, if the end of the first reference period is 15 December 2018, this reference period is counted to the last calendar day, i.e. by 31 December 2018, and this date is the end of the first reference period, and from that date the 20 working days for submission of the first continuous PIR project and the RfP is counted.

**The demonstration of unit completion means that the expenditures are documented.**

The MA sets the content of the report and the content and the format of annexes in MS2014+ in relation to the announced call for the submission of grant applications.

The Beneficiary will document the following in project PIR/Final Implementation Report:

* outcomes and results of key activities/mobilities (see Chapter 11.3),
* completed units (see Chapter 5.2.4) and related eligible costs (see Chapter 8.7.1),
* Return Phase of Mobilities (see Chapter 5.2.4).

Documents required to be provided together with project PIR and form of their submission are given in Chapter 11.3 “Instructions for Beneficiaries” and Chapter 5.2.4 “Eligibility of Project Activities”.

The document submitted together with the project PIR may be presented in Czech, Slovak or English languages, or in the event of irregularities in English documents, OP RDE MA may request their translation into the Czech language.

Return Phase is documented in PIR/Final Implementation Report by “Activity Report in Return Phase”. During the return phase, the units are not completed, i.e. there is no entitlement to the payment of individual costs of the completed units.

Rules for reporting completed units and their eligibility for supported activities with return phase:

During the project implementation, the Beneficiary will continuously include all completed units of the given Mobility (i.e. the Key Activity), except for the last completed unit, in the list of units for billing. It concerns the implementation period, before the implementation of the Return Phase of the given Mobility.

The last completed unit for the given Mobility can be presented for billing by the Beneficiary after the completion of the Return Phase. If the condition of the Return Phase is not met by the Beneficiary, the expenditures equal to unit costs for the last completed unit of the Mobility are designated as non-eligible and will not be paid by the provider[[21]](#footnote-22). Such last completed unit will always be included in the time of Mobility implementation eventually in the small-scale aid if it was not completed earlier.

Example:

Unit cost per unit: CZK 10,000

Number of planned units of the given mobility: 12

Number of completed units of the given mobility for the whole time of project implementation: 12

The calculation of eligible expenditures for the given mobility while meeting the condition of the return phase: unit cost x number of units, i.e. 10 000 x 12 = CZK 120,000.

The calculation of total eligible costs for the given mobility when the condition of the return phase is not met: (unit cost x number of completed units) – unit cost per unit, i.e.
(10 000 x 12) = 120,000 – 10,000 = CZK 110,000

**Request for Payment**

The provider will pay a subsidy of up to co-financing share of EU and SR at maximum, in line with the co-financing level according to Chapter 8.1.5 of the Rules for Applicants and Beneficiaries –General Section, and at the same time up to the amount of funds planned in project budget chapters 1.1. and 1.2. (i.e. except for sub-chapters of the project budget “Unused Funds”, please see Chapter 5.2.5.). The co-financing will be required according to the specified ratio for each grant application.

The amount of each grant application corresponds to the unit costs according to the completed and demonstrated units in the monitored period. The reduction of the number of completed units due to the non-approval by the MA means reduction of such total unit costs, i.e. eligible expenditures submitted in the grant application (ie the reduction of the charged eligible costs in the grant application from the OP MA).

Units for each of the supported activity are defined in Chapter 5.2.4.

As part of each unit, the provider will pay only expenditures for the days worked. For each completed unit, only 100% of unit costs as part of the given Mobility can be paid at maximum (or including the support tool).

The provider will pay eligible expenditures that are equal to the unit costs for fully or partially completed units, demonstrated in the given project PIR and charged in the RfP.

The time of incapacity for work in excess of 14 days is not included in the unit performance. It means, a proportional part of the Unit Costs corresponding to the time of incapacity for work in excess of 14 days, cannot be submitted for billing as part of the project PIR/RfP.

Other instances and corresponding time (e.g. the employee is entitled to salary compensation from external resources or other allowances from public funds (social security), are not included in the unit performance and the corresponding portion of the unit cost is not eligible for the project (i.e. only the actual time worked as part of the given mobility is eligible).

|  |
| --- |
| **Note**The performance of unit, or inclusion of the unit performance time does not have to correspond to the inclusion of time in the mandatory mobility duration and minimum mobility duration/small-scale aid, e.g. a period of incapacity for work longer than 14 days but less than 2 months shall not be counted into the unit fulfilment (that is the cost of these units is not reimbursed), it is not included in 320 hours of small-scale aid, **but the time is included in the mobility performance time for the determination of its minimum and maximum duration (6–24 months).** |

The minimum part of the unit that can be paid is 1 day (mobility including the support tool). For the purposes of the unit fulfilment, the day that have not been worked in its entirety or in part is not deemed a day worked, i.e. it will not be paid by the provider. Other rules for unit reporting are given in the following table.

**Auxiliary table of rules for the inclusion of the mobility work idle time and for the performance of the units as part of the given mobility**

|  |  |  |  |
| --- | --- | --- | --- |
| Absence type | Is included/is not includedinto minimum duration/small-scale aid (960 hours.) | Is included/is not included in the mobility performance time | Is included/is not included in the unit fulfilment (or including the support tool) |
| Holidays (aliquot part)[[22]](#footnote-23) | NO | YES | YES |
| Holidays (above the aliquot part) | NO | NO | NO |
| Holidays | NO | YES | YES |
| Incapacity for work up to 14 days (incl.) | NO | YES | YES |
| Incapacity for work from 14 days to 2 months (incl.) | NO | YES | NO |
| Incapacity for work exceeding 2 months | NO | NO | NO |
| Obstacle from work, with entitlement to salary/salary compensation paid by the employer[[23]](#footnote-24) | NO | YES | YES |
| Absence without an entitlement to salary/salary compensation (wage) such as unpaid leave | NO | NO | NO |

7.1.2. Information on Project Implementation Progress

Specified in the Rules for Applicants and Beneficiaries – General Section.

7.3.1. Final Report on Project Implementation.

Specified in the Rules for Applicants and Beneficiaries – General Section.

7.1.4. Final Report of the Project for the Whole Period of the Project Implementation (hereinafter FPCR for the whole implementation period)

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

7.1.5. Interim Report on Project Sustainability

This chapter is not relevant for the Call “International Mobility of researchers – MSCA – IF II”.

 7.1.6. Final Report on Project Sustainability

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

* 1. Project Changes and Project Supplementation

Specified in the Rules for Applicants and Beneficiaries – General Section. Furthermore, for the projects of this call applies:

Unless specified otherwise below, any modifications to the budget are always assessed by the character of the substantive change (significant/insignificant) that was behind the modification and will always be administered together with the change of the substantive character.

The following changes are not permissible in projects:

* Increasing the number of Mobilities.
* Reduction of the mobility implementation under the limit of small-scale aid /minimum duration.
* Planned split of the Mobility/stay.
* Change in the researcher.
* Change in the research programme/field.
* Transfer of funds between the budget chapters.
* Increasing the project budget.
* Reduction of all target values of indicators to zero.

7.2.1. Insignificant Changes in the Project

Specified in the Rules for Applicants and Beneficiaries – General Section. 7.2.1.1. Insignificant Changes of a Material Character

For the projects of this call applies:

* **Change in the Beneficiary’s contact details.**
* **Change of the name of the partner's subject.**
* **Change in the contact person**.
* **Legal change of the beneficiary** - renaming or change of legal form.
* **Change in the status of the VAT payer.**
* **Change of the statutory body/person** **authorised to act on behalf of the beneficiary.** The Beneficiary must send the notification within five business days about the change of the representative of the statutory body together with the source materials demonstrating this change.
* **Change of place of project implementation** - under condition that there is no change in the financing ratio between more and less developed regions.
* **Earlier project termination** when all obligations are complied with (all Mobilities and Return Phases have taken place as planned or following the changes, target values of indicators are fulfilled).
* **Mobility suspension** for serious reasons for the necessary time (total, Mobility implementation time will remain the same and will only be spread over time).

In case of individual incapacity for work:

* up to 2 months (inclusive) of incapacity for work, the time of the incapacity for work is included in the specified Mobility duration, therefore a change request does not have to be filed.
* after 2 months of incapacity for work the incapacity for work is not deemed Mobility implementation time with all consequences, therefore a request for significant change must be filed.

In the event of an approval, the Beneficiary must state the Mobility suspension in the Activity Report (suspended from-to), which is part of the project PIR.

* **Other changes that do not affect the achievement of indicators and the fulfilment of the project objectives** (following the consultation with MA).

7.2.1.2. Insignificant Changes of a financial Character

Unless specified otherwise below, any modifications to the budget are always assessed by the character of the substantive change (significant/insignificant) that was behind the modification and will always be administerated together with the change of the substantive character.

7.2.2. Significant Changes in the Project

Specified in the Rules for Applicants and Beneficiaries – General Section. 7.2.2.1. Significant Changes Constituting the Change to the Legal Act on the Grant Award/Transfer

* Specified in the Rules for Applicants and Beneficiaries – General Section. In addition, the following changes are relevant to the projects of this Call:**Adding an indicator** (only indicators defined in the Call can be added).
* **Reduction of Mobility duration** – the number of planned months/weeks/days of the mobility implementation (scientific-research stay) will be reduced.
* **Change of the termination date of the project implementation** - the change is accompanied by the documentation of the revised schedule of the project implementation, these variants are possible:

• extension of the project implementation time;

• shortening of the project implementation time - the earlier termination of the project implementation is possible only if the Beneficiary, despite the earlier completion of the project, reaches the planned outputs and results of the project and fulfilsthe purpose of the subsidy.

* **Suspension of the Return Phase resulting in the extension of the project implementation** – only for serious reasons if the conditions of the Call with regard to the maximum project implementation time are met, if there is a risk beyond the Beneficiary’s control that the return phase could not be fulfilled.
* **Removal of a mobility from the project.**

7.2.2.2. Significant Changes (major)

For this Call, significant changes to the project are considered to be major changes to the facts that were declared in the grant application in connection with the mobility implementation and are not given in Chapter 7.2.1 or 7.2.2.1. These changes include but are not limited to:

* **Earlier submission of PIR/PA** – with the approval of the proposal by MA, deadlines for the submission of the following PIR/PA are revised.
* **Suspension of Return Phase not resulting in the termination of the project implementation** – only for serious reasons, if there is a risk beyond the beneficiary’s control that the Return Phase could not be fulfilled.
* **Substantive change to the project as submitted toHorizon 2020 – MSCA-IF** not mentioned above (such as change in supervision).
* Reduction of the work load[[24]](#footnote-25) for personal, family or business reasons. The reduction is permitted only up to 50% of the full-time workload and must be agreed with by the Beneficiary, the guest organization and the supervisor.

**In case of any doubt about the type of change, it is regarded that it concerns a significant change.**

7.2.2.3. Changes in the Sustainability Period

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

* 1. Project Termination and Sustainability

7.3.1. Timeframe for Closure of Projects

Specified in the Rules for Applicants and Beneficiaries – General Section.

7.3.2. Project Completion in terms of Formal Aspects

Specified in the Rules for Applicants and Beneficiaries – General Section.

7.3.3. Project Completion in terms of Monitoring and Financing

Specified in the Rules for Applicants and Beneficiaries – General Section. Only the provision related to the establishment of arrears of payments/returns including the keeping of the bank account and provisions of financial settlement will be applicable.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II”:

 For the purposes of financial settlement, the total volume of absorbed funds shall mean the total amount of Unit Costs paid under the approved activity unit where the conditions for their absorption are specified in the legal act, i.e. the amount of subsidy equal to the number of fulfilled outcomes.

7.3.4. Failure to Achieve the Purpose of the Grant upon the Project Completion

Specified in the Rules for Applicants and Beneficiaries – General Section.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II”:

The purpose of the subsidy is to complete activity units in the total amount of at least 50% of the subsidy amount, i.e. the total of unit costs for completed units documented by the approved units must at least constitute 50% of the subsidy amount given in the legal act.

7.3.5. Non-standard Project Termination

1. **Cancellation of the implementation of the project on the part of the applicant before the issuance of the legal act on the grant award/transfer**

 Specified in the Rules for Applicants and Beneficiaries – General Section.

1. **Early termination of the implementation of the project with the issued legal act on the grant award/transfer**

Specified in the Rules for Applicants and Beneficiaries – General Section.

In addition, the following applies to the call “International Mobility of Researchers – MSCA-IF II”:

Early termination of the project when all obligations are fulfilled is not deemed early termination within the meaning of this chapter.

7.3.6. Project Sustainability

This chapter is not relevant for the Call “International mobility of Researchers – MSCA – IF II”.

* 1. Retention of Documents

Specified in the Rules for Applicants and Beneficiaries – General Section.

7.4.2 List of Documents and Project Outputs that Are the Subject of Retention

With regard to the Call “International Mobility of Researchers - MSCA-IF II”, the obligation to retain documents demonstrating the purpose of the absorption of funds via accounting records, invoices and bank account statements, is irrelevant.

1. Chapter – Processes and Rules for Financial Management
	1. Project Financing

Specified in the Rules for Applicants and Beneficiaries – General Section. In the event of ex-ante funding, units can be documented/ outputs can be presented in the project PIR up to the amount of paid advance payments by MA.

The provisions of funds, by the so-called flow subsidy, as described in Chapter 8.3.

8.1.1. Ex-post payment

This chapter is not relevant for the Call “International mobility of Researchers – MSCA – IF II”.

8. 1. 2. Ex-ante payment

Specified in the Rules for Applicants and Beneficiaries – General Section.

With regard to the Call “International Mobility of Researchers – MSCA-IF II”, ex-ante funding method is specified for all Applicants/Beneficiaries, including a contributory organisation of the state organisational unit (CO SOU), where MEYS is a founder (see Chapter 8.1.4).

**The Beneficiaries will receive the first advance payment as the sum of the planned expenditure for the first two reference periods specified in the financial plan; however, 25% of the estimated total eligible project costs.** The provider of support will provide advance payments up to the amount of co-financing of EU and SB share in line with the co-financing level under Chapter 8.1.5. Rules for Applicants and Beneficiaries – the General Section, and at the same time up to the difference between the approved total eligible project costs and current value budgeted in sub-chapters of the project budget “Unused Funds” will be paid to the Beneficiary (see Chapter 5.2.5).

8. 1. 3. Combined Payment Financing

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

8. 1. 4. Making Payments of SOUs Publicly Co-Funded Organizations of SOUs (PCO SOU)

Specified in Rules for Applicants and Beneficiaries – General Section.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II” state organisational units are not eligible applicants.8. 1. 5. Co-financing in OP RDE Projects

Specified in the Rules for Applicants and Beneficiaries – General Section.

In addition, the following applies to the call “International Mobility of Researchers – MSCA-IF II”:

The ratio of distribution of funds among the OP RDE programming areas is entered in Specific Objectives in IS KP14+ tab (among less and more developed regions):

|  |  |  |  |
| --- | --- | --- | --- |
| Project location | Project impact location: | Percentage payable to a less developed regions | Percentage payable to more developed regions |
| Less developed region | Less developed region | 100% | 0% |
| More developed region | More developed region and less developed region | 74% | 26% |
| More developed region and less developed region | More developed region and less developed region | 74% | 26% |

* 1. Accounting and Documentation

Specified in Rules for Applicants and Beneficiaries – General Section.

* 1. Bank Account

Specified in Rules for Applicants and Beneficiaries – General Section.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II”:

If a contributory organisation founded by a territorial self-governing unit is the beneficiary, the funds are paid via the so-called **flow subsidy through the founder**, or using the account of the region and founder.

In the legal act the account number of both the Beneficiary’s account and account of the region are given in case of flow subsidies. Even though, the funds are provided using accounts of the region, the region (municipality/association of municipalities) may not take whatsoever decision regarding the volume and purpose of the funds designated to the approved project implementation.

The provider will send the competent regional authority an accompanying letter containing information of the granted subsidy, necessary details for the identification of the financial transfer and also, the date for further transfer of funds to the municipality (voluntary association of municipalities)/PCOs, so that the transfer is made without undue delay. A copy of the legal act is attached to this letter. If funds of a contributory organisation of a municipality (voluntary association of municipalities) are provided), i.e. in a two-stage process through budgets of both the region and municipality, such information and dates are included in the accompanying letter which is addressed by the region to the relevant municipality.

* 1. Cash

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

* 1. Value Added Tax

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

* 1. Reporting of Expenditures

8.6.1. Full Reporting of Expenditures

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

8.6.2. Simplified Reporting of Expenditures

With regard to the Call “International Mobility of Researchers – MSCA-IF II”, the total eligible project expenditures will be reported using a **standard scale of unit costs (see Chapter 8.6.2 of the Rules for Applicants and Beneficiaries –General Section, clause a)).**

The simplified cost reporting does not fully release the Beneficiary from the obligation to comply with rules of the EU and legal regulations of the Czech Republic applicable to e.g. publicity, awarding of public contracts, equal opportunities, sustainable development, public aid etc.

* 1. Eligible Expenditure

8.7.1. General Conditions for Eligibility of Expenditures

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II”:

The fulfilment of condition in line with legal regulations of the EU and the Czech Republic, in line with OP rules and aid conditions, adequacy, time eligibility, relation to the programme area and demonstrableness is always evaluated in relation to the demonstration of the completed unit within the given mobility.

**Territorial Eligibility of Expenditures**

Specified in the Rules for Applicants and Beneficiaries – General Section.

From the viewpoint of the place of the project, the project expenditures are assessed in relation to the physical project implementation - the project expenditures are eligible if the project is implemented in the territory defined in Chaoter 5.2.2.2 of this document.

**From the time perspective,** the eligibility of expenditures is assessed in relation to the physical project implementation – if the units were completed in the project implementation time, it is deemed that unit costs are also eligible from the time perspective.

**The amount of project eligible expenditures** composed of Unit Costs is equal to the sum of products of the number of completed units and relevant Unit Cost i.e. **an expenditure shall mean** Unit Costs equal to the number of the completed units. The unit of activities and Unit Costs will be specified by MA – see Chapter 5.2.4.

If violation of procedures regarding public contract awards or publicity rules is found, it can be difficult or even impossible to establish the exact impact on the project. If such violation is established, aid provider will impose a sanction to the Beneficiary for the violation of such procedures or rules according to the list of financial remedies for the breach of obligations when awarding contracts specified in the annex to the legal act.

**The first possible date to commence project physical implementation is the date when the call is announced in IS KP14+ (this date represents the earliest possible date of eligibility of costs).**

8. 7. 2. Eligible Expenditures by Their Type

The following applies to the Call “International Mobility of Researchers – MSCA-IF II”[[25]](#footnote-26):

Only unit costs equal to the completed activity units specified in Chapter 5.2.4 are eligible expenditures.

Only units where the small-scale aid was fulfilled (supported activity No. 2) are eligible for payment of the Unit Costs. It means, units after the fulfilment of the small-scale aid, see Chapter 11.3. can be submitted in project PIR.

Only units where the minimum duration of mobility was fulfilled (supported activity No. 1) are eligible for payment of the unit cost. The minimum duration of mobility in the supported activity No. 1 is 960 hours. The minimum duration of mobility is evaluated in a similar manner as the small-scale aid – see Chapter 11.3.

During expenditure reporting, the Beneficiary must submit any documents necessary to verify that the activities or outputs that are listed in the legal act were actually carried out.

If, as part of administrative verification, OP RDE MA discovers a irregularity resulting in the failure to approve the completed units/outputs these appropriate unit costs are deemed non-eligible expenditures and will not be paid by the provider.

Accounting documents or other documentation of equivalent evidence nature are not submitted to demonstrate eligible expenditures. For the purposes of payment of the payment request, the Beneficiary demonstrates the completion of units, or degree of unit fulfilment.

8. 7. 3. In-kind Contributions in OP RDE

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

8. 7. 4. Indirect/flat Costs

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

* 1. Ineligible Expenditure

With regard to the Call “International Mobility of Researchers – MSCA-IF II”:, the eligibility of expenditures is always considered in relation to completed or approved units.

Any expenditures that do not correspond to Unit Costs of completed units are not deemed eligible.

Failure to meet the conditions under which a researcher is required to attend a conference / workshop / workshop, etc., at least once every 6 months of mobility, the unit costs of these 6 months are considered ineligible.

* 1. Income from the Project

8.9.1. General Rules for Projects Generating Income according to Article 61

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

8.9.2. General Rules for Projects with Income outside of Article 61

Covered in Rules for Applicants and Beneficiaries – General Section.

* 1. Financial Sanctions for Breach of Duties of the Beneficiary/Partner

The following applies to the Call “International mobility of Researchers – MSCA-IF II”:

**Early termination of researcher’s mobility when trivial/minimum duration is fulfilled:**

|  |  |
| --- | --- |
| Supported activity / support tool | The amount of payment as a result of breach of budgetary discipline in case of an early mobility termination |
| **Support of the “no money” MSCA Projects - Arrivals to the Czech Republic** | 10% from the total value of Unit Costs of non-completed mobility units |
| **Support of the “no money” MSCA Projects - Departures from the Czech Republic** | 10% from the total value of Unit Costs of non-completed mobility units |
| **Support for the Researcher's Family**  | It is not a breach of budgetary discipline |

The amount of payment for the breach of budgetary discipline that will be specified in the legal act on the grant award / transfer.

1. Chapter – Processes and Rules of Inspections and Audits
	1. General Provisions on Checks, Verifications and Audits

Covered in Rules for Applicants and Beneficiaries – General Section.

* 1. Irregularities and Methods of Their Resolution

Covered in Rules for Applicants and Beneficiaries – General Section.

1. Chapter – Processes and rules on comments to MA documents

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. Comments on the MA Source Materials in the Process of Project Approval

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. Comments on the MA Source Materials in Projects under Implementation

Specified in the Rules for Applicants and Beneficiaries – General Section.

1. Chapter – METHODOLOGY OF Indicators of OP RDE
	1. Definitions

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. Instructions for Applicants

When preparing the grant application, the Applicant will select all relevant output and result indicators. The output indicators are reported for every chosen activity (mobility and are given for every activity, see Chapter 5.2.4, **results indicators and output indicators, the so-called milestone (6 00 00), are monitored and reported for the whole project.**

* 1. Instructions for Beneficiaries

The output indicators are given for individual supported activities, including the documentation of output indicators.

**Indicator of milestone and results reported for the project of the Call “International Mobility**
**of Researchers – MSCA-IF”:**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Code** | **Indicator** | **Monitoring and reporting** |
| Output indicator for project – milestone | 6 00 00(milestone) | Total number of participants | The indicator is fulfilled by the implementation of the supported Activity No. 2.The supported individual is reported in the reference period in which the person reached petty support. **Small-scale aid is set to be 960 hours**. The Beneficiary will attach a name list of participants who reached the small-scale aid with designation of new names for the monitored period to the project PIR where indicator 6 00 00 will be reported.On-site inspection:A participant card which must be signed by the participant and kept by the Beneficiary in case of an on-site inspection. **Not demonstrated in the project’s Implementation Report.** The participant card will be filled in IS ESF2014+ on-line or off-line when the participant enters the education process. The procedure of how to work in IS ESF2014+ is described on MEYS website. (Participant card sample: <http://www.msmt.cz/strukturalni-fondy-1/monitorovaci-indikatory-op-vvv>). The Beneficiary gradually registers the included hours adjusted for “non-eligible” hours in IS ESF2014+ system, see 7.1.1 “Auxiliary Table for the Inclusion of the Mobility Work Idle Time”. |
| Indicators of results for the project | 2 08 10 | Number of organisations whose employees upgraded their qualification in R&D, its management and related fields | The organisation of the Beneficiary is included and reported in the project just once, following the end of the Return Phase, with at least 50% of the approved individual mobilities in supported Activities No. 2. The accomplished value of the indicator must be reported in the Final Project Implementation Report at latest.Together with the reporting of the target value, the Beneficiary will submit a list of staff members according to the performed mobilities, including the time of Return Phases and at the same time a Final Report of researchers where he will describe their contributions to achieving the results of individual research activities, benefit for each of the staff members and subsidy Beneficiaries, will calculate the number of Mobilities following the end of the Return Phase and the total number of the Mobilities under Activities No. 2 that have been carried out and also the percentage ratio between the Mobilities and Return Phases that have been carried out. |
| 2 04 15 | Number of research organisations with new incoming researchers either from abroad or from private sector | The organisation of the Beneficiary is included and reported in the project just once, following the end of at least 50% of all of the relevant indicator output units u 2 04 03 (in supported activity No. 1).The accomplished value of the indicator must be reported in the Final Project Implementation Report at latest.Together with the reporting of the target value, the beneficiary will submit a list of involved staff members and Final report of the organisation regarding the work of researchers and their added value for the organisation. |
| 5 43 10 | Number of supported cooperations | The indicator is mandatory for Supported Activity No. 2, it is mandatory for Supported Activity No. 1 if secondment is part of the mobility.The indicator value is reported in project Final Project Implementation Report.Collaboration will be established during the project; it is documented by a contract / agreement / memorandum of cooperation or a similar document.Continuously in the PIR project, the recipient describes the course and the fulfillment of the cooperation.The contract / agreement / memorandum of cooperation must generally include the following elements:The contracting parties, purpose, or objective, description of the cooperation and period, for which the cooperation is concluded, information of any financial flows and declaration that the researcher will work exclusively on the non-economic activity in the host country.The final progress cooperation report will be submitted as part of the project's Final Implementation Report by the Beneficiary.It is necessary to submit copies; the originals are kept by the Beneficiary with project documentation for on-site controls. The indicator is fulfilled by the performance of each supported activity.Each involved entity is counted only once.The target value of the indicator is not automatically counted through the Mobility Calculator, the applicant will set the target value of the indicator according to the activities carried out. |

**Definitions of OP RDE indicators are available at MEYS website:** [**http://www.msmt.cz/strukturalni-fondy-1/monitorovaci-indikatory-op-vvv**](http://www.msmt.cz/strukturalni-fondy-1/monitorovaci-indikatory-op-vvv)**.** The website also contains document templates for submitting the indicators: <http://www.msmt.cz/strukturalni-fondy-1/prehled-vzoru-prilohy-monitorovacich-zprav>.

11.3.1. Protection of personal data

Specified in the Rules for Applicants and Beneficiaries – General Section.

11.3.2. Common indicators

**Small-scale Aid**

The project must be designed so that the educational activities (Mobility) of the supported person would overall accomplish the limit of small-scale aid in the supported Activity No. 2.

The small-scale aid is set to be **960 hours**. When this limit is achieved, the person is included into indicator 6 00 00 *Total number of participants*.

In the monthly Activity Reports, the participant must fill monthly the allocated working hours, hours of absence in the month and hours included in the small-scale aid adjusted for the types of absence - please see Chapter 7.1.1 “Auxiliary Table for the Inclusion of the Mobility Work Idle Time” - for each performed activity unit. The calculation is made based on the monthly allocation of working hours, from which the absence will be deducted.

Example: Mr. Novak has 1.0 working time. In January, the monthly allocation of working hours in Germany is 176 hours for 1.0 working time in the given calendar month. Therefore, for Mr. Novak it is relevant to work 176 hours. In January, Mr. Novák will take two days off, therefore he will deduct 8+8 hours from 176 hours. In total, he will report 160 hours in the monthly activity report 160 hours in the small-scale aid.

These 160 hours of the Beneficiary will be reported in IS ESF14+ for the supported person. Gradually, the awarded time allocation of the participant will be reported for each month. When 960 hours are achieved, indicator 6 00 00 will be included.

**The following absences are not included in the duration of the small-scale aid (960 hours):** holidays, incapacity for work, obstacles from work, with an entitlement to salary or salary compensation paid by the employer and absence without salary/salary compensation (such as unpaid leave), see Chapter 7.1.1 “Auxiliary Table for the Inclusion of the Mobility Work Idle Time”.

* 1. Financial Adjustments due to Beneficiary’s Irregularity

The legal act obliges the beneficiary to fulfil the obligatory indicators, and specifies specific sanctions for their non-fulfilment.

Fulfilment of output indicators is an obligation specified under Section 14 (4) letter k) of budgetary rules and a failure to meet them is not a breach of budgetary discipline.

As part of this Call, sanction for the breach of budgetary discipline is specified in the legal act for failure to meet the output indicator 6 00 00, the so-called milestone and for result indicators.

1. Chapter – Procurement and Examination Procedures

 Specified in the Rules for Applicants and Beneficiaries – General Section.

1. Chapter – Partnership

This chapter is not relevant for the Call “International Mobility of Researchers – MSCA – IF II”.

1. Chapter – Synergies and complementarities

Specified in the Rules for Applicants and Beneficiaries – General Section.

In addition, in this Call, no requirements are placed on the Applicants/Beneficiaries in connection with the complementarity of this Call.

1. Chapter – State aid

Support will be provided only to projects that do not constitute State Aid within the meaning of Article 107(3) TFEU.

* 1. Introduction to State Aid

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. Public Funding for Education and Research and Development Not Constituting State aid

Specified in the Rules for Applicants and Beneficiaries – General Section.

For projects under this Call, the demonstration of the share of the economic activity in the total capacity of the given entity (relevant entity) for the previous calendar (economic) year arising from the reporting methodology of economic activities with a view to the state aid as part of OP RDE is not relevant. Nevertheless, for the purposes of demonstration of a clearly complementary character of economic activities of research organisations supported from OP RDE funds within the meaning of clause 20 of the Framework for the Call “International Mobility of Researchers – MSCA-IF”, the following applies:

* only an organisation for research and knowledge dissemination can be a Beneficiary/host organisation under the Framework;
* in order to be provide a support not having the elements of the state aid within the meaning of Article 107 (1) SFEU, it is essential that the researcher only perform non-economic activities (i.e. activity defined in paragraph 19 of the Framework) with the Beneficiary or host organisation;
* if a Short-term Secondment is integrated in the researcher’s Mobility (as it is permissible under the conditions of H2020 – MSCA-IF), it may only be performed with the research organisation as part of a non-economic activity. Short-term Secondment performed with an enterprise or as part of economic activity of the research organisation is not eligible for funding and cannot be supported;
* if a Return Phase is part of the Key Activity (relevant for Activity No. 2 Support of the “no money” MSCA Projects - Departures from the Czech Republic), where transfer of experience gained abroad into the Czech Republic occurs, it is necessary that the researcher perform non-economic activity (or potential economic activity can be performed only complementary within the meaning of paragraph 20 of the Framework) during such return phase.

To demonstrate the conditions above, it is necessary that:

1. the Applicant would submit a “Declaration of the Project Compliance with the Rules of the State Aid” together with the grant application;
2. the Applicant, together with the grant application would submit a contract / agreement / memorandum of cooperation or a similar document with the host research organisation that will contain a condition of the performance of non-economic activity of the researcher in the host organisation (it concerns Activity No. 2 “*Support of the “no money” MSCA Projects - Departures from the Czech Republic”* and a in the event of involvement of Short-term Secondment, for both of the supported activities);
3. the Applicant, together with the grant application would submit an employment contract or a draft[[26]](#footnote-27) of the employment contract between the Applicant and the researcher (it concerns Activity No. 2 “Support of the “no money” MSCA Projects - Arrivals to the Czech Republic”), from which it must be clear that the given staff member will exclusively perform non-economic activity during the Mobility;
4. if the sent researcher also performs an activity for the Beneficiary’s organisation during the Mobility as part of his/her working time, the beneficiary must, in the implementation period, submit a declaration that the given researcher performs economic activity, being only a complementary one (i.e. Less than 20% of the working hours allocation of the time worked for the beneficiary) as part of this activity/working time in the monitoring period. For the inspection purposes, this can be effectively demonstrated by:
* employment contract/job description of the given researcher, which clearly shows that the researcher is not involved in the performance of economic activity with the beneficiary, or
* actual records of activities (e.g. in the form of statement of work or similar records), if researcher’s employment contract/job description allows to perform economic activities. These records must be submitted to the provider by the Beneficiary or the purposes of random checks of conditions of the performance of predominantly non-economic activity
1. the Beneficiary in a form of “Activity Report“ together with each Project Implementation Report, which must clearly show that the researcher performs an exclusively non-economic activity with the host organisation in the reported period;
2. following the completion of the Return Phase (relevant only for Activity 2 “Support of the “no money” MSCA Projects - Departures from the Czech Republic), the Beneficiary would submit Activity Report in Return Phase, which must clearly show that the given researcher did not perform any non-economic activity during the return phase and that such activity was merely complementary in the Return Phase (within the meaning of paragraph 20 of the Framework). The character of activities performed during the Return Phase can either be verified in the employment contract/job description of the given staff member. The contract/job description must clearly state that the given staff member is not involved in the performance of economic activity. If the researcher’s employment contract allows him/her to perform an economic activity, the Beneficiary must demonstrably record the use of work hours allocation of this researcher broken down to economic and non-economic activities for the duration of the return phase (in a form of the statement of work of similar records). These records must be submitted by the beneficiary to the provider upon request for the purposes of inspection of how the conditions of the performance of predominantly non-economic activities during the return phase are fulfilled.
	1. Exceptions Allowing State Aid without the Need to notify the EC

This chapter is not relevant for the Call “International mobility of researchers – MSCA – IF II”.

* 1. Identification of State Aid in the Scope of Supported Activities

The analysis of the public aid as part of OP RDE can be found at OP RDE website: <http://www.msmt.cz/uploads/OP_VVV/Verejna_podpora/Analyza_VP_OPVVV_V4.pdf>.

* 1. Basic Obligations of the Applicant/Beneficiary in the Area of State Aid

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. State Aid Register in MS2014+

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. Consequences of the Breach of State Aid Rules

Specified in the Rules for Applicants and Beneficiaries – General Section.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA – IF II”:

If a breach of the conditions of performance of non-economic activity in the host research organisation, is established if the limit of complementary economic activity in the Return Phase of the researcher is exceeded, the condition, under which the subsidy was granted is violated and the expenditures paid for such mobility will be handled in line with Chapter 9.2 of the Rules for Applicants and Beneficiaries – the General Section.

1. Chapter – Horizontal principles (pursuant to Article 7 and 8 of the General Regulation)

Covered in Rules for Applicants and Beneficiaries – General Section.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II”:

With regard to the horizontal principle (HZ) “*Equal opportunities and non-discrimination”,* the applicant selects an option “*Positive impact on the horizontal principle” or “Neutral impact on the horizontal principle in the grant application in IS KP14+”*. If a positive impact is chosen, the mandatory text field “*Description of the justification the project impact on the horizontal principles”* that must be completed will be activated. Here, the Applicant will enter the positive impact that the chosen activities will have on this horizontal principle. If a neutral impact is selected, an optional text field will be activated.

The Applicant will select an option “*Positive impact on horizontal principle” or “Neutral impact on horizontal principle”* to the horizontal principle *“Equality of men and women”*. If a positive impact is chosen, the mandatory text field “*Description of the justification the project impact on the horizontal principles”* that must be completed will be activated*.* Here, the applicant will enter the positive impact that the chosen activities will have on this horizontal principle. If a neutral impact is selected, an optional text field will be activated.

The applicant usually selects an option “*Neutral to horizontal principle for the HP”*. The text field” Description *and justification of the project impact to horizontal principles”* does not need to be fulfilled If fulfilled, the content will not be evaluated.

The option “*Targeted focus on horizontal principle”* will not be selected by the Applicant for any HP.

1. Chapter – Publicity rules

Specified in the Rules for Applicants and Beneficiaries – General Section.

1.
2. 1. General Obligations of Beneficiaries in terms of Publicity

Specified in the Rules for Applicants and Beneficiaries – General Section.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II”:

The documents related to workshops organised by the Beneficiary or host institutions must comply with the rules of mandatory publicity.

* 1. Obligatory Elements in Obligatory and Optional Tools/Optional Publicity

Specified in the Rules for Applicants and Beneficiaries – General Section.

* 1. Financial Adjustment in case of Non-compliance with the Publicity Rules for Beneficiaries in OP RDE

Specified in the Rules for Applicants and Beneficiaries – General Section.

1. CHAPTER – Annexes

**Annexes No. 1 -12**

Covered in Rules for Applicants and Beneficiaries – General Section.

With regard to this call, Annex No. 11 “Reporting Methodology of Economic Activities with a view to the State Aid” is not relevant for this Call.

**Annex No. 13: List of annexes to the aid application and how they are submitted**

Overview of the relevant annexes to the grant application can be found in the table below. The current text of model annexes to the grant application is available in IS KP14+ under the announced Call. Updates of model annexes to the grant application do not constitute a change in the Call.

With regard to annexes, when the template in ISKP14+ is not available, the applicant creates or submits the document separately.

Forms to submit annexes:

* “electronic original” (primarily electronic statements or documents with certified electronic signature); or
* or officially verified copies in electronic form – documents created by the authorized conversion of the original in paper form into electronic form;
* or a simple copy (scan).

Form to submit annexes in English:

* Any annexes that have to be presented in English must be named in English.
* The file containing all documents in English must be compressed into .zip and uploaded to the system, for example under the name Documentation English Version (i.e. in reality it will be one annex containing all documents in English).

Before the issuance of the legal act on the grant award/transfer, the applicant must submit a Czech translation of documents presented in English upon request.

**List of Annexes - International Mobility**
**of Researchers – MSCA-IF II:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name of mandatory annex to the grant application | **Method of submission of annex, description of the submission** | **Form of submission (original/copy)** | **Language**  | Link to evaluation criteria  | **Who makes submission** |
| **Statutory declaration:**  **– initial** **– final** | A statutory declaration in the grant application (in IS KP14+) | Original | Czech | F3, P2 | Every eligible applicant |
| **Declaration of eligibility:****- own funds****– approval of founder****– enforcement proceedings****– clean criminal record (of natural persons and legal entities)** | Annex to the grant application (model) | Original | Czech | F3, P2, F10 | Every eligible applicantExceptions:– Provision of own funds – not to be declared by PCO SOUs; – Consent of the founder – to be only declared by PCO SOUs and PCO of territorial self-governing units |
| **Proof of bank account / sub-account** | Annex to the grant application (template is not available) - e.g. a certified copy of the concluded contract on the account, confirmation of account keeping, account statement without financial information. | Original or certified copy | Czech | F3, P2 | Every eligible applicant |
| **Declaration of project compliance with the state aid rules** | Annex to the grant appliation (template) | Original | Czech | F3, F10 | Every eligible applicant |
| **Schedule of key activities** | Annex to the grant application (template) | Simple copy | Czech | F3, P8, P9 | Every eligible applicant |
| **Mobility Calculator -MSCA** | Annex to the grant application (template) | Simple copy | Czech | F3, P1 | Every eligible applicant |
| **Application submitted in Horizon 2020, MSCA, Individual Fellowships- European Fellowships** | Annex to the grant application (template is not available) | Simple copy | English | F3, P1, P2, P5, P6 | Each eligible applicant, for each mobility separately |
| **Evaluation summary report for a project submitted in Horizon 2020, MSCA, Individual Fellowships- European Fellowships** | Annex to application for support (template is not available) | Simple copy | English | F3, P1, P2, P5, P6 | Each eligible applicant, for each mobility separately |
| **Employment contract or the draft[[27]](#footnote-28) of this contract of the researcher with the grant applicant** | Annex to application for support (template is not available) | Certified copy | Czech, English | F3, P2 | Each eligible applicant, for each mobility separately |
| **CV of the researcher.** | Annex to application for support (template is not available) | Simple copy | Czech, Slovak, English | F3, P2 | Each eligible applicant, for each mobility separately |
| **Statutory declaration that the principles given in the Charter for Researchers, Code of Conduct and Receipt of Researchers and European Code for Research Integrity are complied with** | Annex to aid application (template) | Original | Czech | F3 | Every eligible applicant |
| **A contract / agreement / memorandum of cooperation or a similar document with the host research organisation** | Annex to application for support (template is not available) | Certified copy | Czech, English | F3, P2 | Every eligible applicant |
| **Name of elective annex to the grant application** | **Method of submission of annex, description of the submission** | **Form of submission (original/copy)** | **Language**  | **Relation to evaluation criteria** | **Who makes submission** |
| **Proof of the absence of debt** (not older than 90 days) | Annex to the grant application (template is not available) | Original or certified copy | Czech | F3, P2 | Applicant - against those health insurance companies in the Czech Republic where the applicant's employees are registered- not to be declared by PCO SOUs, PCO of territorial self-governing units  |
| **Affidavit of the absence of debt**(not older than 90 days) | Annex to the grant application(template is not available) | Original or certified copy | Czech | F3, P2 | Applicant - against those health insurance companies where the applicant's employees are not registered– not to be declared by PCO SOUs, PCO of territorial self-governing units  |
| **Eligibility documents**  | Annex to the grant application – e.g. formation deed, statute, memorandum of association, formation charter, etc. | Simple copy | Czech  | F3, P2, P5  | Applicant –state universities and R&D institutions and entities registered as of the date of application for the aid on the list of research organizations |
| **Demonstration of ownership structure** | Annex to the grant application (model) | Original or certified copy | Czech  | F3, P5  | Applicant - for exceptions please see Chapter 5.2.1 |
| **Document on annual turnover**  | Annex to the grant application (template is not available) – profit and loss statement or another report on economic management | Simple copy | Czech | F3, F9 | Applicant – not to be declared by PCO SOUs and PCO of territorial self-governing units (see Chapter 5.2.1.) |
| **Document on the bank account of the founder** | Annex to the grant application (template is not available) - e.g. a certified copy of the concluded contract on the account, confirmation of account keeping, account statement without financial information. | Original or certified copy | Czech | F3, P2 | Applicant – to be only declared by PCO of territorial self-governing units– to be only declared in case of the so-called flow subsidies- optional if the founder is also the aid provider |
| **Power of attorney / authorisation for representation** | Annex to the grant application (template is not available) | Original or certified copyCertified copy | Czech, English | F3, F5, P5 | Applicant - if it is a person acts on behalf of the applicant under the power of attorney. |
| **Affidavit on the active data box and the commitment to have the data box active during the whole period of implementation and sustainability of the project.** | Annex to the grant application (template) | Original or certified copy | Czech | F3, P2 | Applicant - for whom the establishment of a data box is not mandatory and if they have an active data box.– if requested to submit it |
| **Statutory declaration of the researcher regarding the entitlement to family allowance** | Annex to the grant application  | Original or certified copy | Czech, Slovak, English | F3, P2 | Applicant – for each mobility, separately |

For templates of all mandatory and elective annexes, see IS KP14 +, the grant application,the Documents tab, the procedure is as follows:

On the “Dokumenty” (Documents) tab, select "Nový záznam” (New Entry) in the "Název přddefinovaného dokumentu” (Predefined document name) drop-down list, select the desired annex (eg. "Prokázání vlastnické struktury žadatele” (Demonstration of ownership structure) and save the record. A template file for that annex is then located at the bottom of the screen under the blue "Stáhnout soubor dokumentu” (Download Document File) button. It is possible to proceed the same/similar way in all cases where the MA has the prescribed template.

1. Chapter – List of Abbreviations

Covered in Rules for Applicants and Beneficiaries – General Section”.

In addition, the following applies to the Call “International Mobility of Researchers – MSCA-IF II”:

H2020 Horizon 2020

MSCA-IF Marie Skłodowska-Curie Actions – Individual Fellowships

WP Work packages

1. EU Official Journal, C198, 27 June 2014, pp. 1-29. [↑](#footnote-ref-2)
2. Commission Delegated Regulation (EU) 2015/2195 of 9 July 2015, on supplementing Regulation (EU) No 1304/2013 of the European Parliament and of the Council on the European Social Fund, regarding the definition of standard scales of unit costs and lump sums for reimbursement of expenditure by the Commission to Member States, as amended. [↑](#footnote-ref-3)
3. The procedures are given in Chapter 5.2.1. Rules for Applicants and Beneficiaries – General Part: are not relevant for this call. [↑](#footnote-ref-4)
4. The applicant has no overdue obligations in relation to the state budget and the state fund. [↑](#footnote-ref-5)
5. The applicant has no overdue obligations in relation to the budget of the territorial self-governing unit, including the region. [↑](#footnote-ref-6)
6. A taxpayer who in accordance with its founding legal acts, statutes, Articles of Association, law or a decision of a public authority body performs non-business like activities as its main activity. A public benefit taxpayer is not a) business corporation, b) Czech Television, Czech Radio and Czech News Agency, c) professional chamber or a taxpayer founded for the purpose of protecting and defending business interests of its members whose membership fees are not exempt from tax payment with the exception of an organisation of employers, d) health insurance companies, e) association of unit owners f) foundation, 1. which according to its founding actions serves to support persons close to the founder or 2. whose activity inclines to support people close to the founder. [↑](#footnote-ref-7)
7. <http://eur-lex.europa.eu/legal-content/CS/ALL/?uri=CELEX%3A32005H0251>. [↑](#footnote-ref-8)
8. During the implementation of the project, it is possible to reduce the work load for serious reasons, see chapter 7.2.2.2. Significant changes (major). [↑](#footnote-ref-9)
9. Active participation is understood as the contribution of a researcher in the form of a presentation, poster presentation, participation in a panel discussion, etc. The active participation of the researcher must be clearly demonstrable. [↑](#footnote-ref-10)
10. Obligatory expenses usually include payments for social and health insurance, FKSP, social fund and health insurance for an employee staying abroad etc. [↑](#footnote-ref-11)
11. During the implementation of the project, it is possible to reduce the work load for serious reasons, see chapter 7.2.2.2. Significant changes (major). [↑](#footnote-ref-12)
12. International events means a conference / seminar / workshop, etc., where active participants from institutions from different countries are involved. [↑](#footnote-ref-13)
13. Obligatory expenses usually include payments for social and health insurance, FKSP, social fund and health insurance for an employee staying abroad etc. [↑](#footnote-ref-14)
14. In case that some research data can not be published in open access (General Annex L of the 2017 Work Program of 25 July 2016), project can “opt-out” of these provisions with due justification. [↑](#footnote-ref-15)
15. In the case of mobility starting on a day other than the first day of the month, only a 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 last full unit/month, the beneficiary will still report the remaining days not worked in the first unit. Activity reports are reported in calendar months. Even incomplete calendar months must be reported. [↑](#footnote-ref-16)
16. Obligatory expenses usually include payments for social and health insurance, FKSP, social fund and health insurance for an employee staying abroad. [↑](#footnote-ref-17)
17. It is a support tool according to the list of activities, please see Chapter 5.2.4. [↑](#footnote-ref-18)
18. Partial time limits are indicative. [↑](#footnote-ref-19)
19. In case of a change in the date of the start of the physical implementation of the project specified in the legal act on granting / transfer the aid, the beneficiary submits a significant change requesting a change to the legal act on granting / transfer aid, see Chapter 7.2 Rules for Applicants and Beneficiaries – General Section. [↑](#footnote-ref-20)
20. In case of a change in the date of the start of the physical implementation of the project specified in the legal act on granting / transfer the aid, the beneficiary submits a significant change requesting a change to the legal act on granting / transfer aid, see Chapter 7.2 Rules for Applicants and Beneficiaries – General Section. [↑](#footnote-ref-21)
21. The approval process phase shall only mean the check of eligibility and formal requirements, the preparation of the legal act on the grant award /transfer is only a follow-up administrative act. [↑](#footnote-ref-22)
22. Compensation for holidays reflects the implementation of mobility, i.e. if the mobility lasts for 6 months, then there is a maximum of 6/12 compensation for holidays (in accordance with valid legislation), the so-called aliquot part. [↑](#footnote-ref-23)
23. The last day of the monitoring period, from which the subsequent time limit for submission of PIR/RfP is determined, falls on the last calendar day of the last month of the monitoring period. [↑](#footnote-ref-24)
24. By reducing the workload, the unit cost to cover the personal costs of the researcher's mobility and administrative and organizational costs, or the unit cost of supporting the family, if relevant, will be reduced accordingly, i.e. the unit cost will be multiplied by the amount of the workload. [↑](#footnote-ref-25)
25. In case of the change of the legal status or legal change of the beneficiary, the granting authority takes note of the change on the basis of the notice written by the beneficiary, however, it does not change the actual legal act on grant award/transfer (i.e. does not issue an amendment to the legal act on grant award/transfer). [↑](#footnote-ref-26)
26. If the applicant submits a draft of the employment contract, the signed contract of employment shall be provided in the first project PIR after the commencement of the mobility. [↑](#footnote-ref-27)
27. If the applicant submits a draft of the employment contract, the signed contract of employment shall be provided in the first project PIR after the commencement of the mobility. [↑](#footnote-ref-28)