Western Balkans Mobility Scheme

A POLICY ANSWERS Pilot Programme

Guide for applicants

Preface:

This guide contains two chapters, the first, chapter 1, dealing with more general information on the application process as Questions and Answers and the second, chapter 2, providing you with a detailed guideline on how to apply at https://ptoutline.eu/app/wbms. In the annex you find the current draft of the financial support contract, which we provided for transparency reasons already in this guide. Please note, that this is only a draft and subject to changes.

Please consult the POLICY ANSWERS website with all call-related documents at https://www.westernbalkans-infohub.eu/calls/western-balkans-mobility-scheme/ before you start the application process.

If your questions are neither answered at the POLICY ANSWERS website nor within this guide for applicants, please contact the Joint Call Secretariat at DLR-PT (e-mail: calls-europe@dlr.de).

Since the projects within this scheme are supported by the European Commission according to the Financial Support to Third Parties (FSTP) regulations, the call will be carried out in the light of the same basic principles which govern European Commission calls[1]:

(1) Excellence: The proposal(s) selected for funding must demonstrate a high quality in the context of the topics and criteria set out in the call.
(2) Transparency: Funding decisions must be based on clearly described rules and procedures, and all applicants should receive adequate feedback on the outcome of the evaluation of their proposals.
(3) Fairness and impartiality: All proposals submitted to a call are treated equally. They are evaluated impartially on their merits, irrespective of their origin or the identity of the applicants.

[1] "Guidance note on financial support to third parties under H2020" (https://www.ffg.at/sites/default/files/downloads/page/h2020guidancenote_financialsupport2thirdparties.pdf)

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(4) Confidentiality: All proposals and related data, knowledge and documents are treated in confidence.
(5) Efficiency and speed: Evaluation of proposals and award of the financial support should be as rapid as possible, commensurate with maintaining the quality of the evaluation, and respecting the legal framework.

1. General information for applicants

1.1. What is the main objective of the POLICY ANSWERS project?

Funded within Horizon Europe, the project entitled POLICY ANSWERS - R&I POLICY making, implementation ANd Support in the WEsteRn BalkanS (https://www.westernbalkans-infohub.eu/about/) was launched on 1 March 2022. Positioned well in line with the EU's Western Balkans (WB) Agenda on Innovation, Research, Education, Culture, Youth and Sport (WB Innovation Agenda), POLICY ANSWER monitors and supports policy coordination within the EU-WB cooperation, but also provides capacity building and pilot actions in the WB to contribute to the region's EU integration process and to strengthen their innovation ecosystems.

1.2. What is the Western Balkans Mobility Scheme (WBMS)?

This pilot regional mobility scheme launched by POLICY ANSWERS has a call budget of EUR 100,000. It should build the foundation for a follow-up measure to be funded by regional, economy-level or international stakeholders. The aim of this scheme is to enhance regional cooperation and sustained support in mobility-driven R&I and - by fostering the interconnectedness of the WB – to support sustainable economic growth, a common regional market, societal resilience and convergence of the WB with the EU. Enhanced cooperation and sustained support in mobility-driven R&I are also pivotal for equipping the WB with the requisite tools and knowledge to address shared challenges, such as climate change and digital transformation, while fostering a generation of innovators who can reshape the region's future.

1.3. Who is eligible to participate in the WBMS?

Only early-career researchers (ECR) affiliated to a research institution from one of the six Western Balkan economies are eligible within the WBMS. These economies are Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia.

* This designation is without prejudice to positions on status, and is in line with UNSC 1244 and the ICJ Opinion on the Kosovo Declaration of Independence.

1.4. What research topics are eligible for funding within the WBMS?

In order to boost the regional cooperation all thematic research areas are eligible (including Social Sciences and Humanities (SSH) and arts-based research). Applications that address the twin transition (green and digital) of the WB and priorities mentioned in research strategies of economies resp. S3 strategies are particularly welcome. The project must have a civilian purpose.

1.5. Are the WBMS applications similar to Horizon Europe applications?

No, in no way. The application process is much simpler and will be implemented as one-stage procedure. In order to lessen the efforts for applicants and to reflect the limited funding sum of about EUR 5,000 per project, all data will be inserted by the applicant in an online form. No additional project description has to be uploaded. The inserted data covering the project description are limited to around 12.000 characters (including blanks, this would result in about four usual pages).

1.6. How do I submit a proposal?

Please visit https://ptoutline.eu/app/wbms and sign up to the WBMS call management system. During your registration, you will be asked for your e-mail address, which will be used as your login. Your password will be sent to the e-mail address you provided. The password is case-sensitive and cannot be changed by you. When you return to the login page, you can log in and start using the application. All forms are interactive. Please save each page before proceeding to the next. Please use only English characters since non-English characters, such as č, ć, š, đ and ž may not be displayed correctly in the final application.

1.7. What are the eligibility criteria?

The eligibility criteria for the applicant, the application as such and the requested costs are provided in the WBMS call text which you can access at https://www.westernbalkans-infohub.eu/calls/western-balkans-mobility-scheme/.

1.8. Which costs are eligible?

Eligible costs are supported by:
(1) an "allowance unit cost" of EUR 75 per day of the stay - resulting in EUR 2,250 per month (30 days) - to compensate for all travel costs and living allowances of the recipient (including cost for visa etc.);
(2) any cost that occurs at the host institution like accession fees, consumables etc.;
(3) costs for exploitation of project results (visibility, publication of scientific article, etc.);

Costs of category (2) and (3) are accounted for as direct costs only (with VAT) that have to be actual, economic and necessary.

Health, accident and personal liability insurances for the time of mobility have to be taken out by the recipients at their own expense.

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The financial support may not be used to cover costs that are already covered by other sources. The financial support is not renewable.

1.9. I'm working at an institution which is part of the POLICY ANSWERS consortium. Am I eligible?

This depends: All team members of the POLICY ANSWERS project are not eligible to apply. So, if you work e.g. at the Mihajlo Pupin Institute you are eligible as long as you are not involved in the project.

1.10. What is the deadline for the submission of applications?

The deadline for submission of applications is 31 May 2024, 17:00 CEST.

1.11. In addition to the online submission procedure, should I submit a paper copy of the application?

No. Only electronic submissions will be considered. However, please note that after submission of your application in PT-Outline, please remember that there is still one task to do in order to apply successfully for a WBMS project: The cover pages of the application must be printed, signed by the early-career researcher as well as by the counsellor, scanned and send as pdf-file to calls-europe@dlr.de.

1.12. Do I need the legal representatives of the home or host institution to sign the WBMS application?

No, we tried to make the application procedures as simple and hassle-free as possible. So, it is only the early-career researcher as applicant and the counsellor to sign the first page of the application form. But please note, that for the contract negotiations we will need the signature of the legal representatives from the home and the host institution on Letters of Confirmation which will be part of the financial support contract.

1.13. Can I submit more than one application?

No, each applicant is only allowed to submit one application. This limitation is made in order to ensure that all applications submitted could be implemented as applied. It could not be expected that the early career researcher is able to implement more than one project in the provided very short implementation period.

1.14. What does it mean that the maximum requested budget must not exceed EUR 5,000?

EUR 5,000 is the maximum amount of funding per project that can be provided from the WBMS budget. However, there is no limit on the total costs for the project's implementation, meaning that contributions from other sources can be used to make up the total project budget.

1.15. What are the review criteria for the WBMS applications?
The review criteria are outlined in the in the WBMS call text which you can access at https://www.westernbalkans-infohub.eu/calls/western-balkans-mobility-scheme/.

1.16. Is it allowed to visit more than one research infrastructure?
No, this would complicate the administrative procedures and the overall structure of the WBMS project.

1.17. Is it allowed to visit the same research infrastructure several times in the curse of the project?
Yes, if this is necessary to reach the aims of the WBMS project then this is allowed.

1.18. Is it allowed to visit research infrastructures in more than one other economy?
No, this would complicate the administrative procedures and the overall structure of the WBMS project.

1.19. Is it relevant for this scheme in which economy I was born?
No, it is relevant in which economy the home institution is located to which you are affiliated to.

1.20. Is it allowed to have more than one grantee in a project?
No, each project has to be implemented by one early-career researcher only.

1.21. How many applications will be funded?
Since the call budget is around EUR 100,000 and the maximum funding sum EUR 5,000 we expect to fund around 20 WBMS projects.

1.22. What are the main regulations laid down in the financial support contract?
In the annex you find the current draft of the financial support contract, which we provided for transparency reasons already in this guide. Please note, that this is only a draft and subject to changes.

1.23. Do I have to upload any attachments to the application?
Yes, it is mandatory to upload the CVs of the early-career researcher and the counsellor (the counterpart at the host institution) in EUROPASS format before submitting the application.

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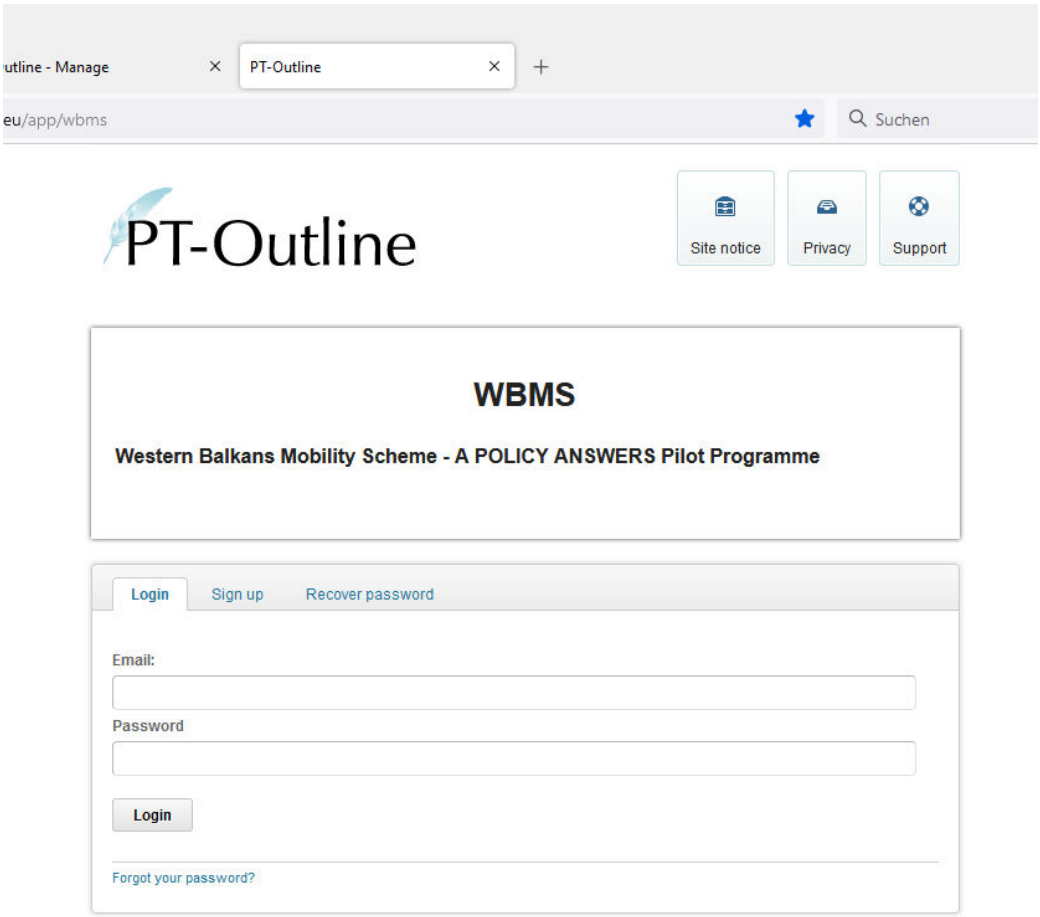
2. The online application procedure for submitting a WBMS application



During your registration via the sign-in dialogue, you will be asked for your e-mail address, which will be used as your login. Your password will be sent to the e-mail address you provided. The password is case-sensitive and cannot be changed by you. When you return to the login page, you can log in and start using the application. All forms are interactive. Please save each page before proceeding to the next. Please use only English characters since non-English characters, such as as č, ć, š, đ and ž may not be displayed correctly in the final application.

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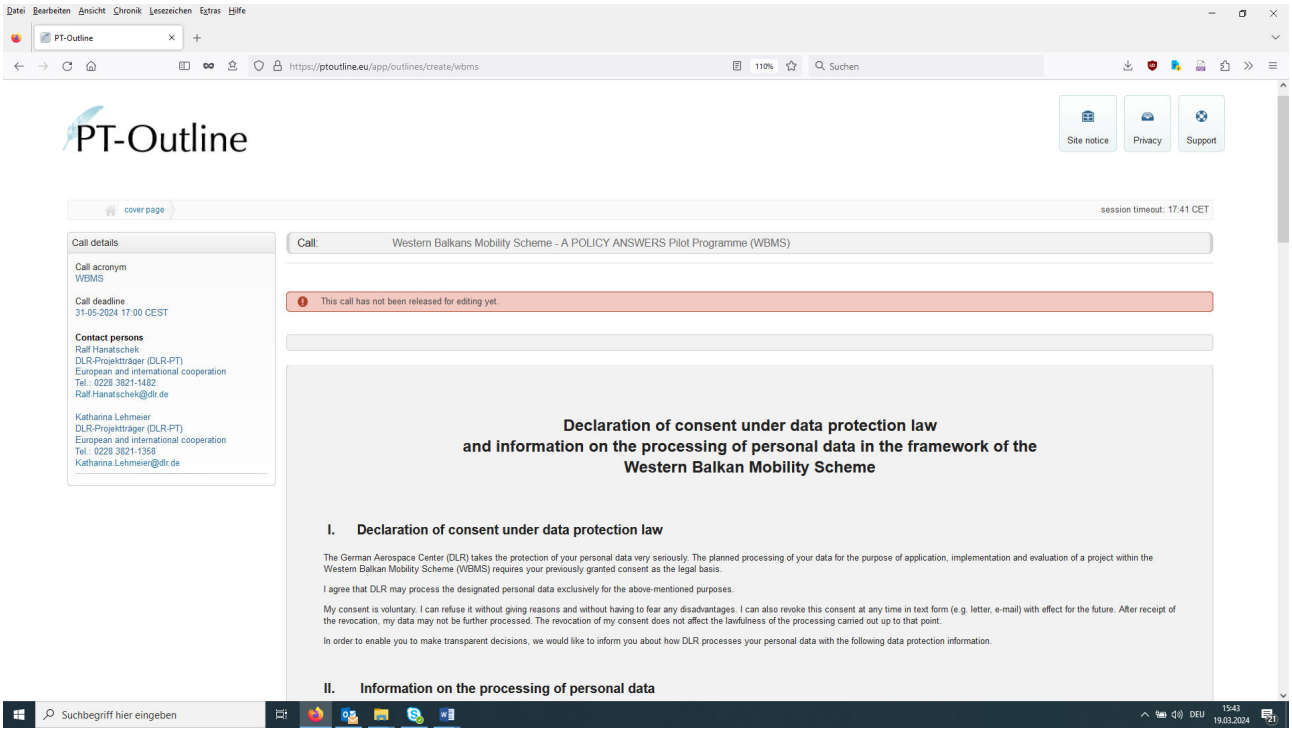

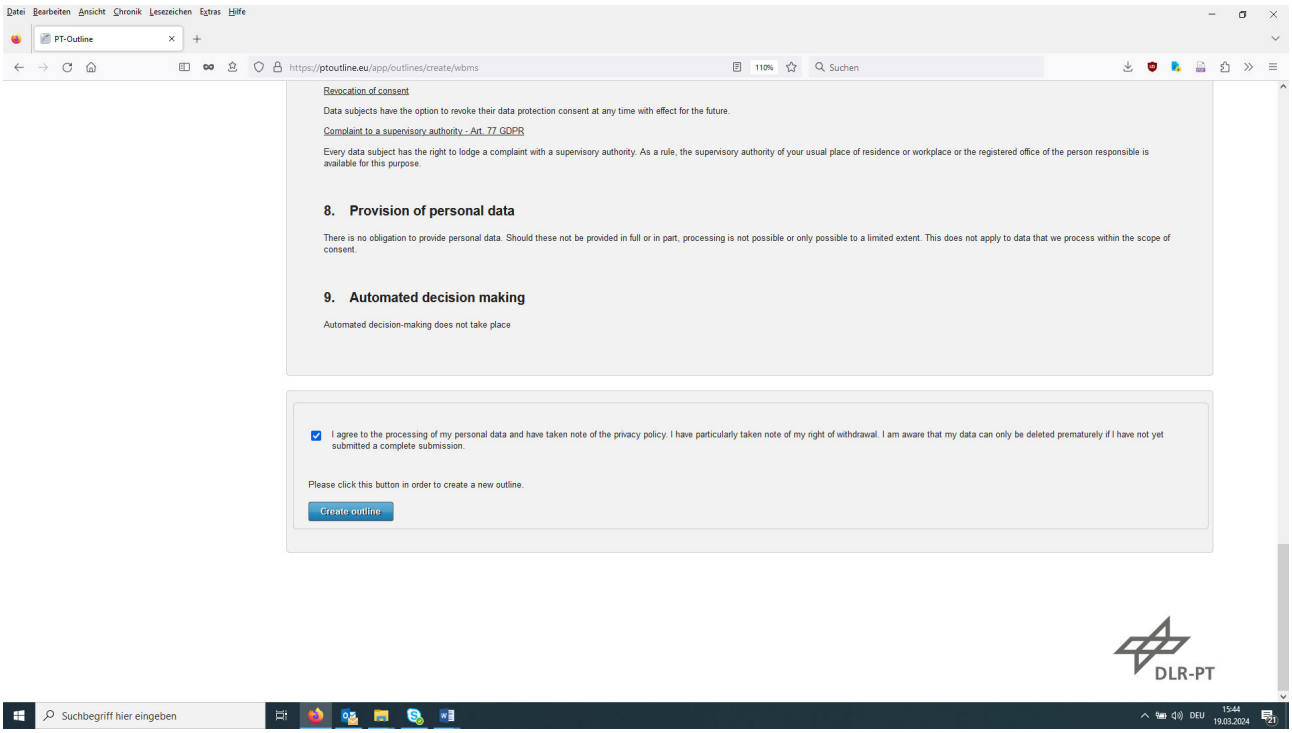

After logging in you have to accept the GDPR by ticking the confirm box.

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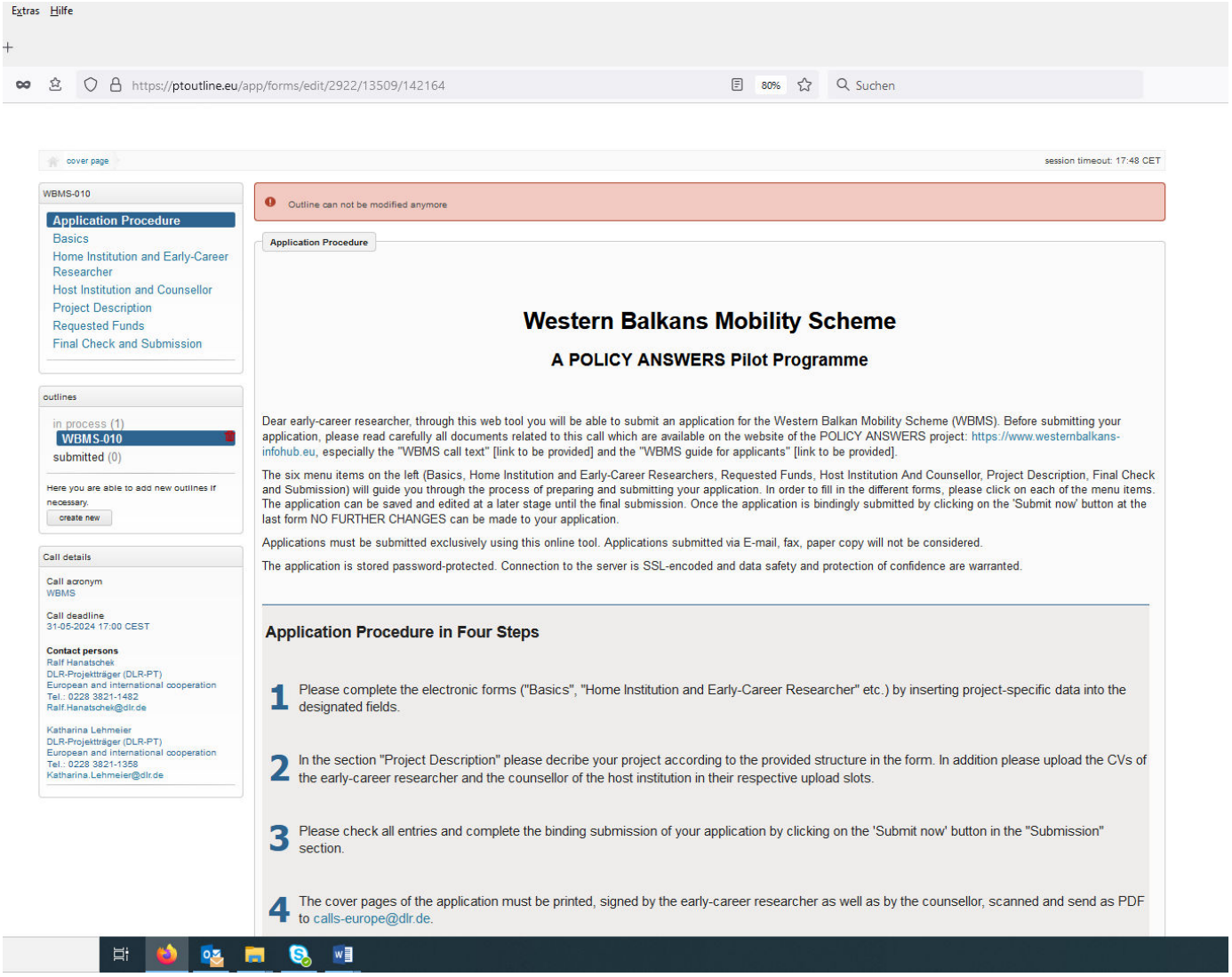

This page gives a general overview of the individual menu items and some general information on the Western Balkans Mobility Scheme and outlines the four steps to the successful application.

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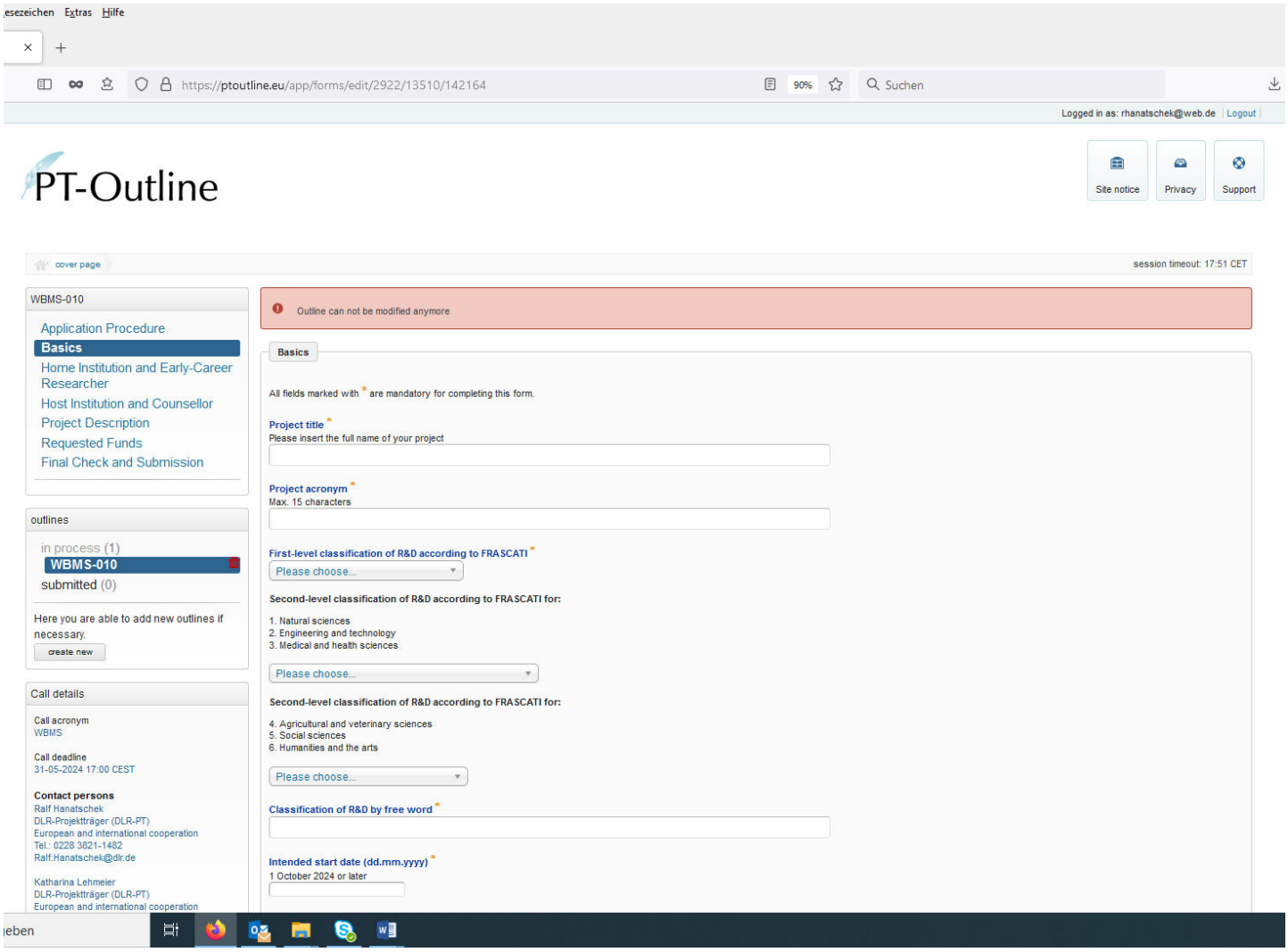

On this page, you can start entering information about your planned project. The screenshot above shows the upper part of the Basics form. Basic project data include an acronym and the title of your WBMS project. Please indicate to which thematic R&I area according to the Frascati classification your project belongs. Please note assigning the correct thematic area will be necessary on two levels: A broader one and a detailed one. This information is not only relevant for statistical reasons but will be a decisive factor when assigning reviewers to your proposal.

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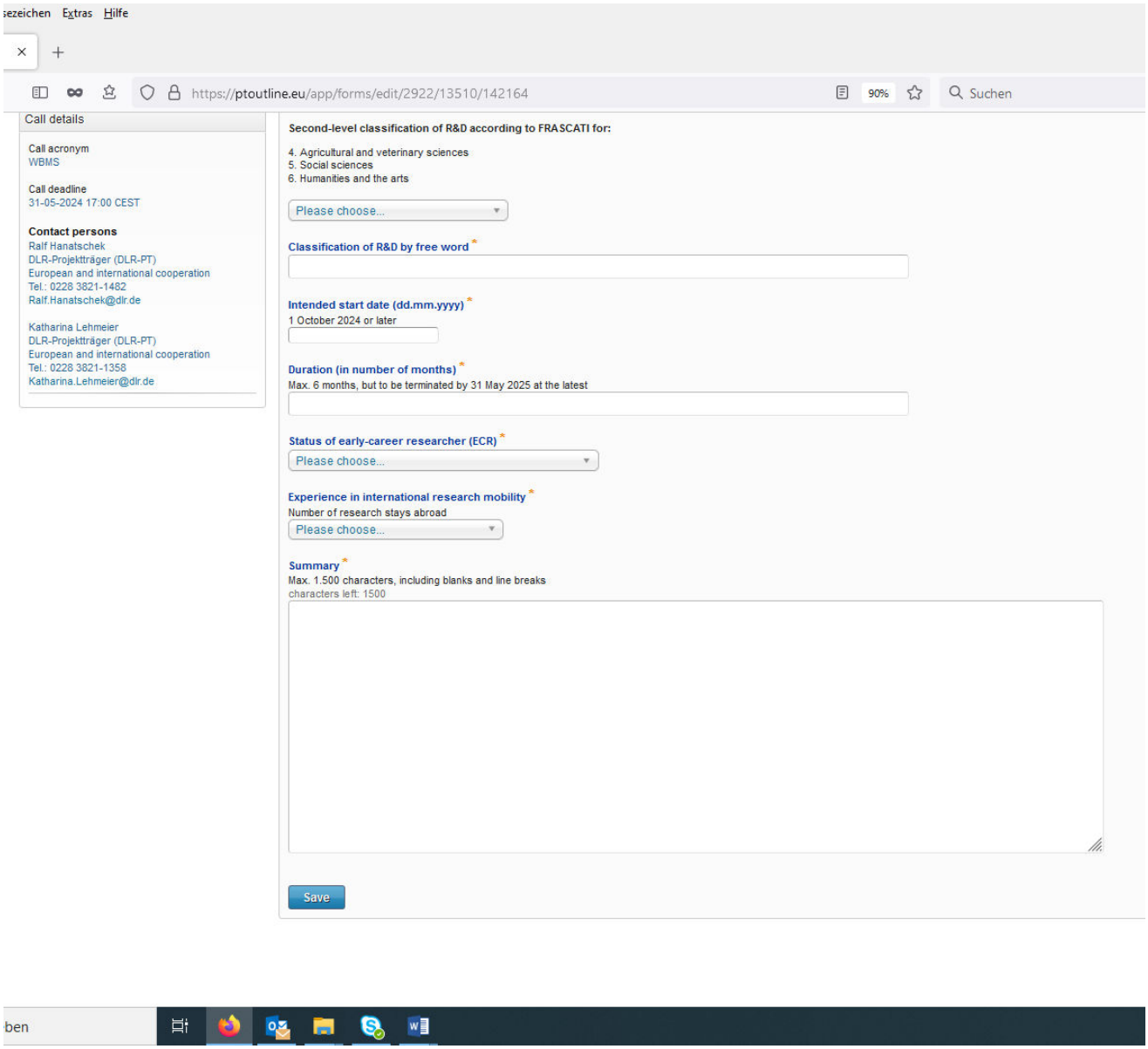

The screenshot above shows the lower part of the Basics form. The planned starting date is only indicative and will be determined once the contract is concluded, if your application is selected for funding. However, all WBMS projects have to be completed until 31 May 2025 at the latest in order to ensure the evaluation of the WBMS. Since the WBMS is a POLICY ANSWERS pilot programme this evaluation process and the preparation of policy recommendations is of high importance in order to find regional, economy-level or international donors for a possible follow-up measure.

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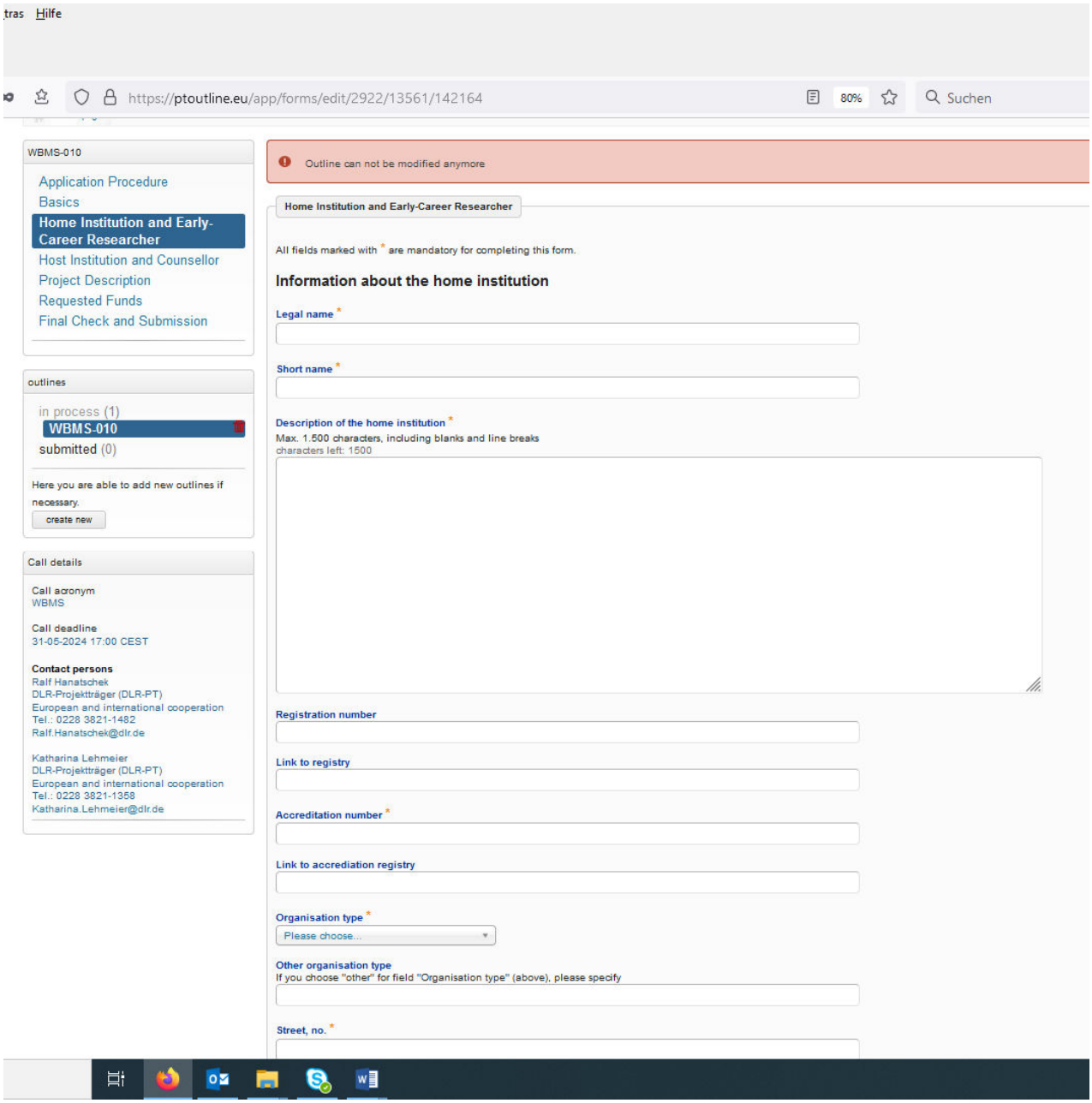

The screenshot above shows the upper part of the Home Institution and Early-Career Researcher form. Here information is requested first about the home institution to which the applicant is affiliated.

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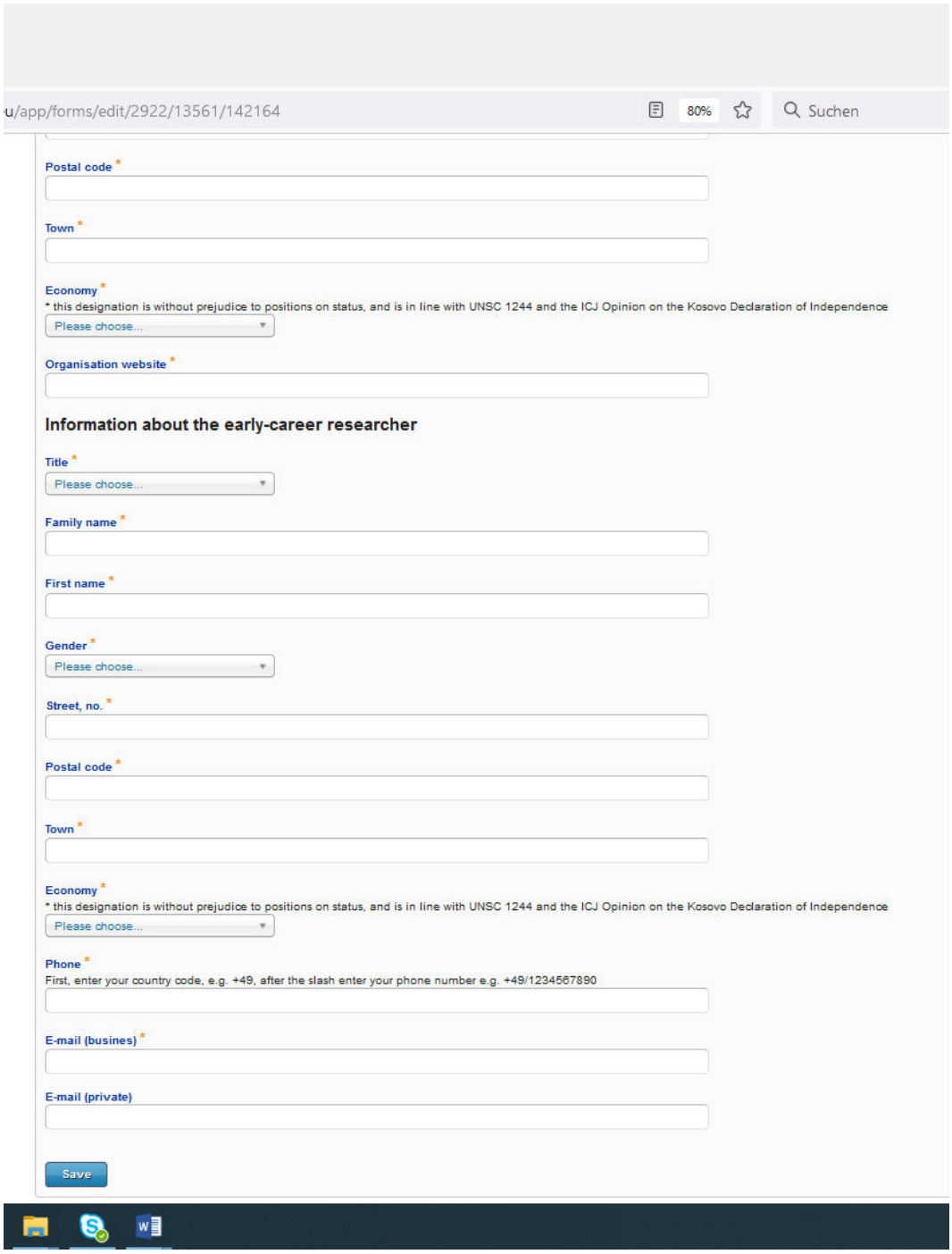

This is the lower part of the Home Institution and Early-Career Researcher form in which secondly information about the applicant, the early-career researcher him-/ or herself has to be filled in.

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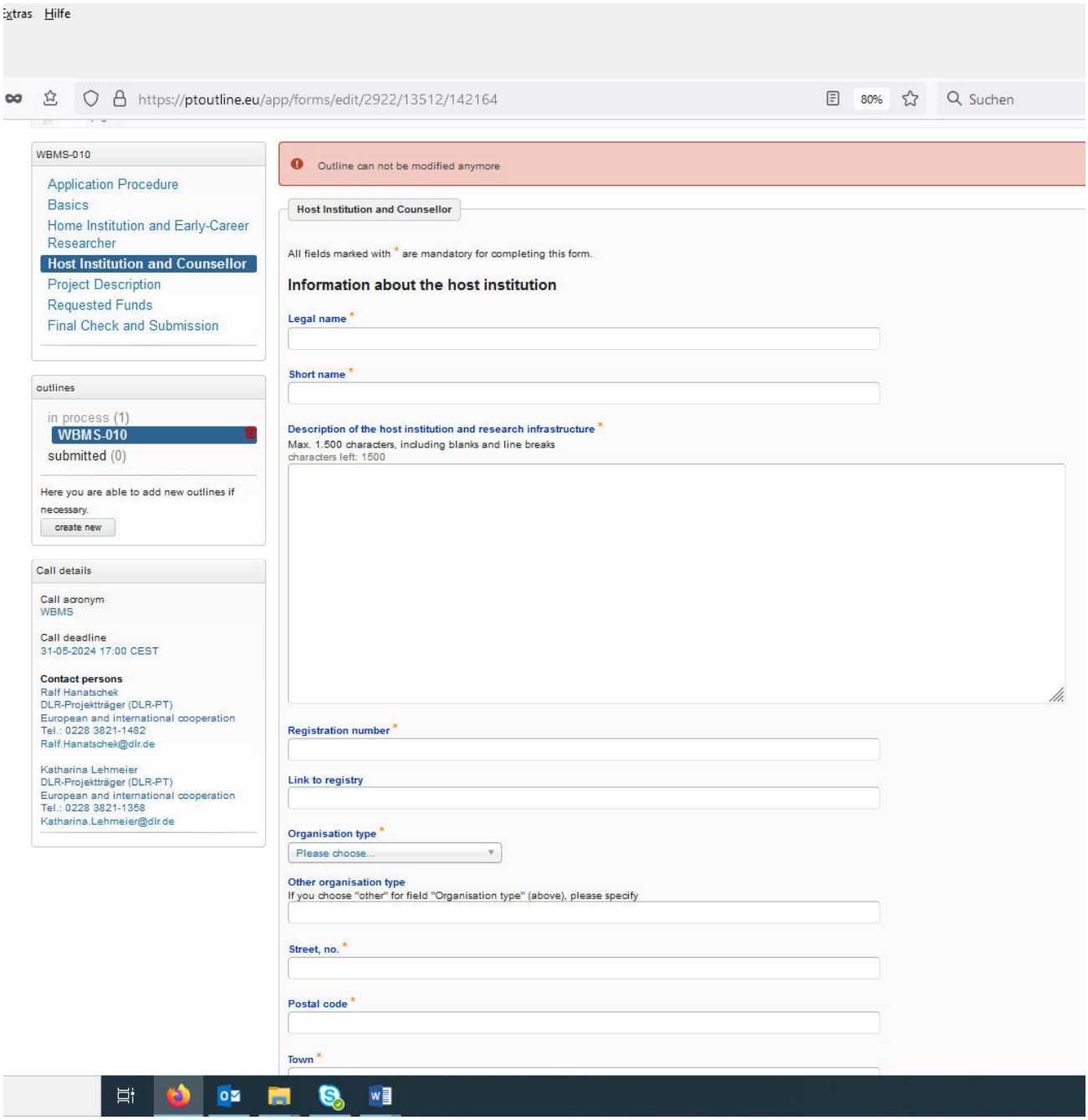

Information on the Host Institution and the Counsellor is requested in the respective form. Above the upper part of the form is presented.

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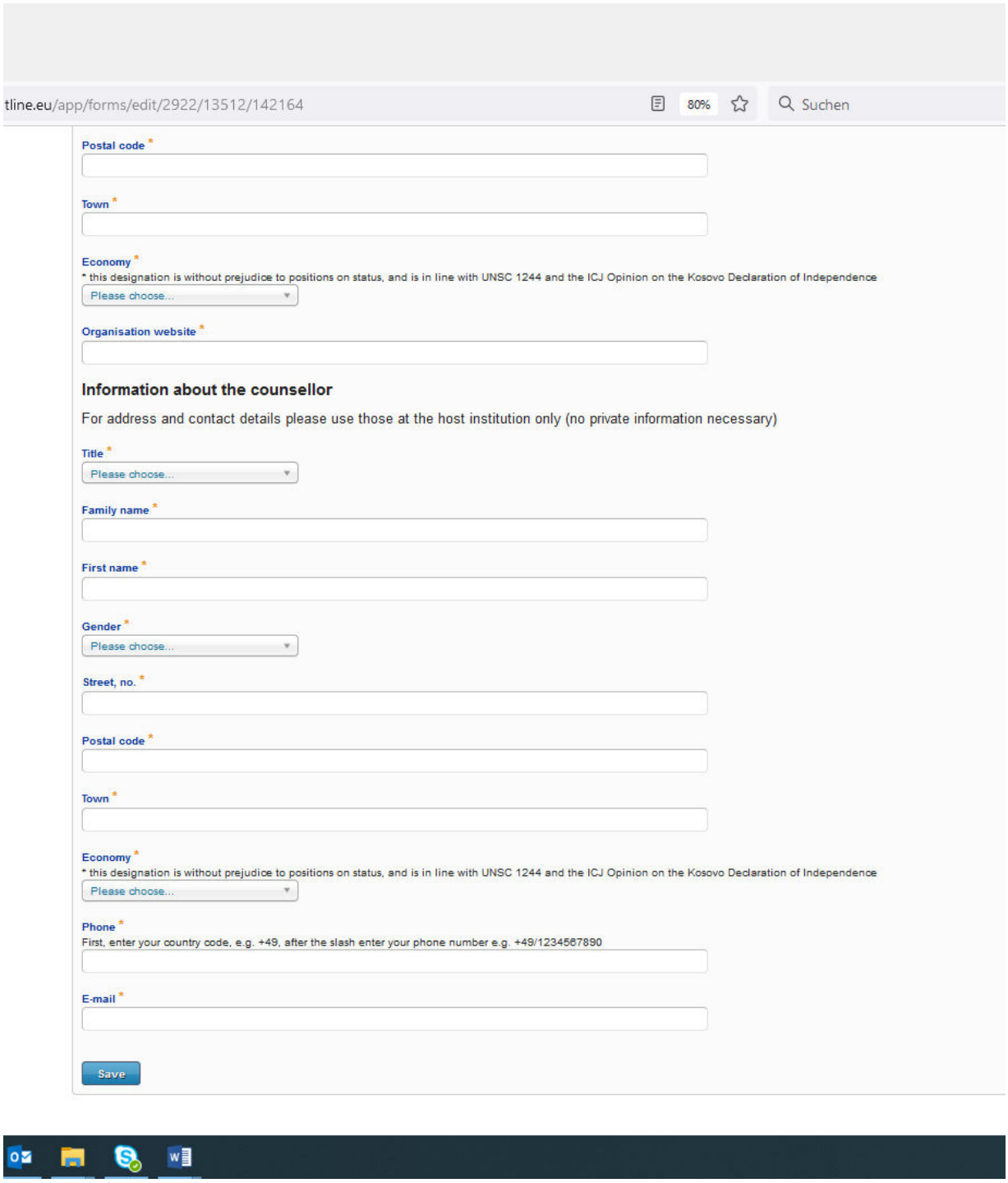

Above the lower part of the form is presented.

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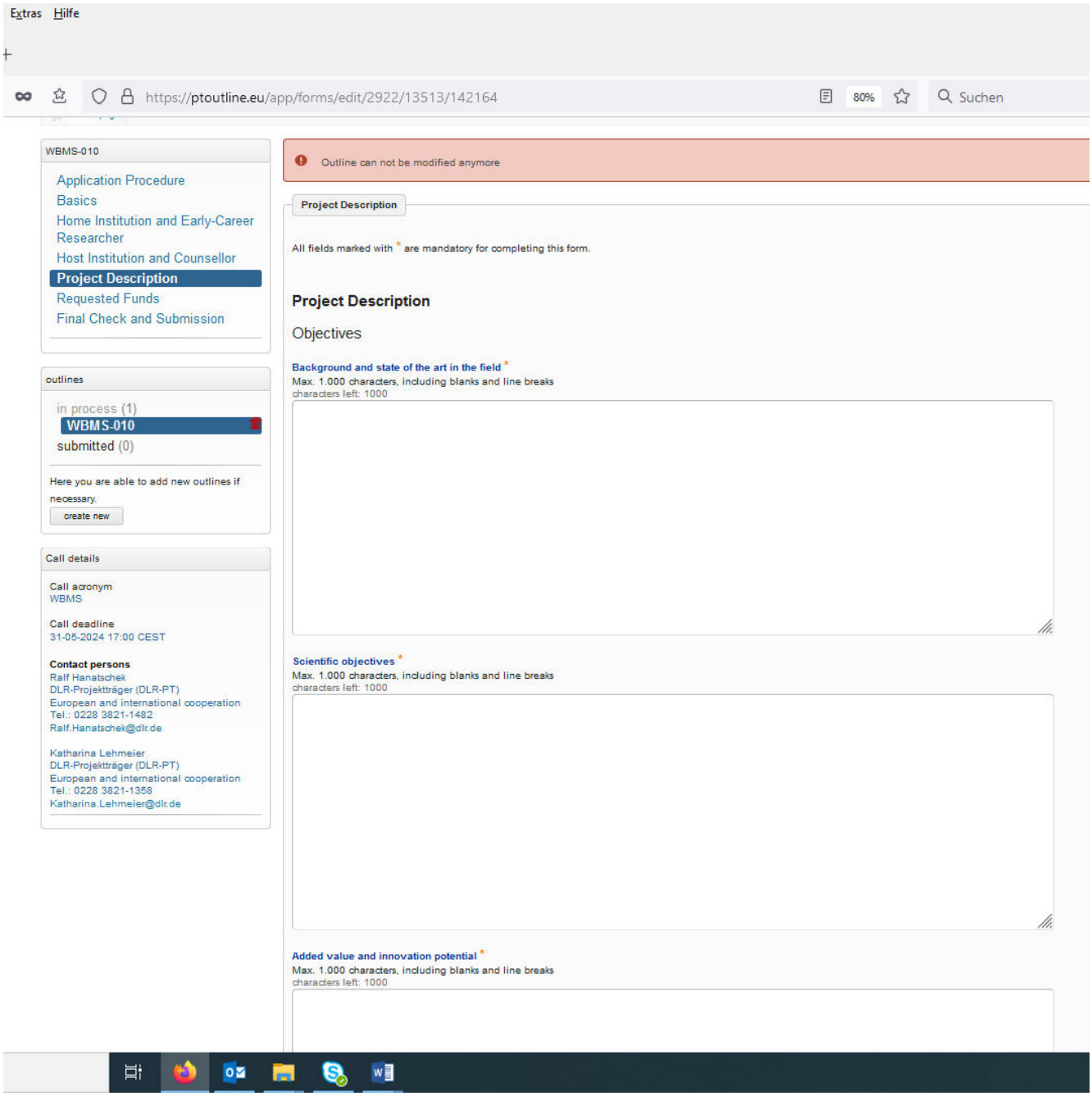

The screenshot above shows the upper part of the Project Description form, while…

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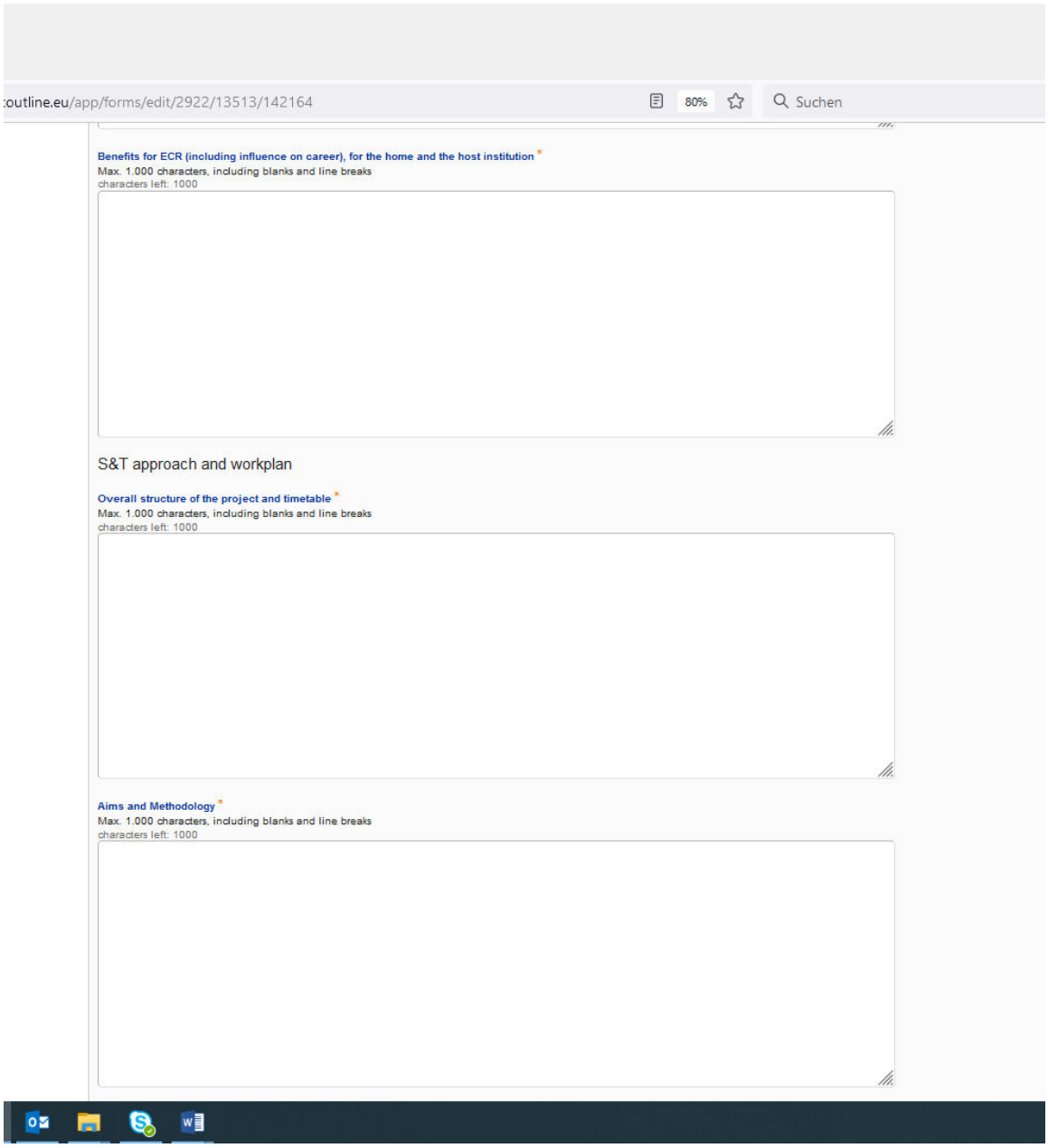

…this screenshot presents the middle part of this form and…

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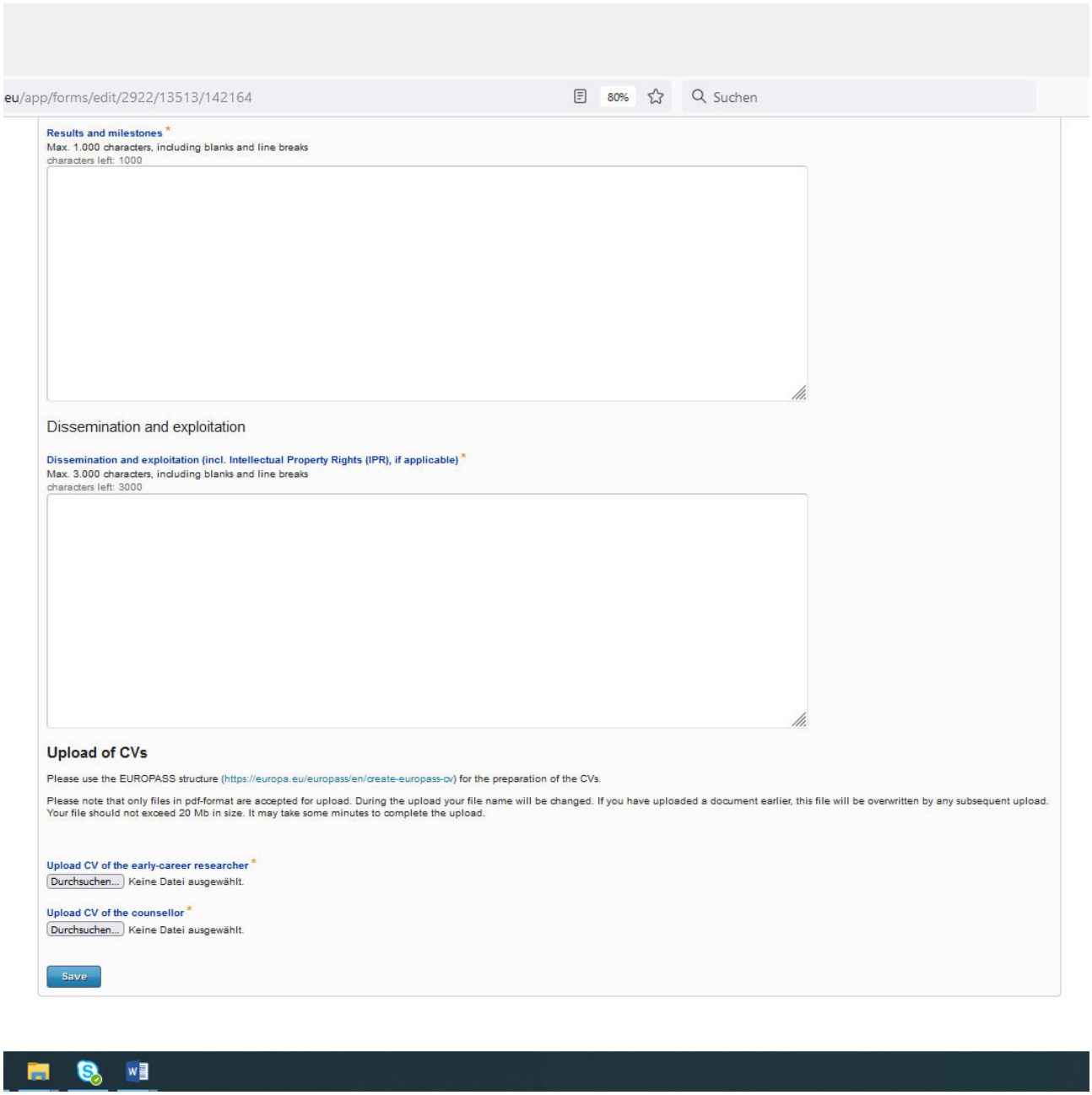

…this is the last part of the Project Description form. Please note that in addition to the description of your project, it is mandatory to upload CVs in EUROPASS format of the applicant and the counsellor.

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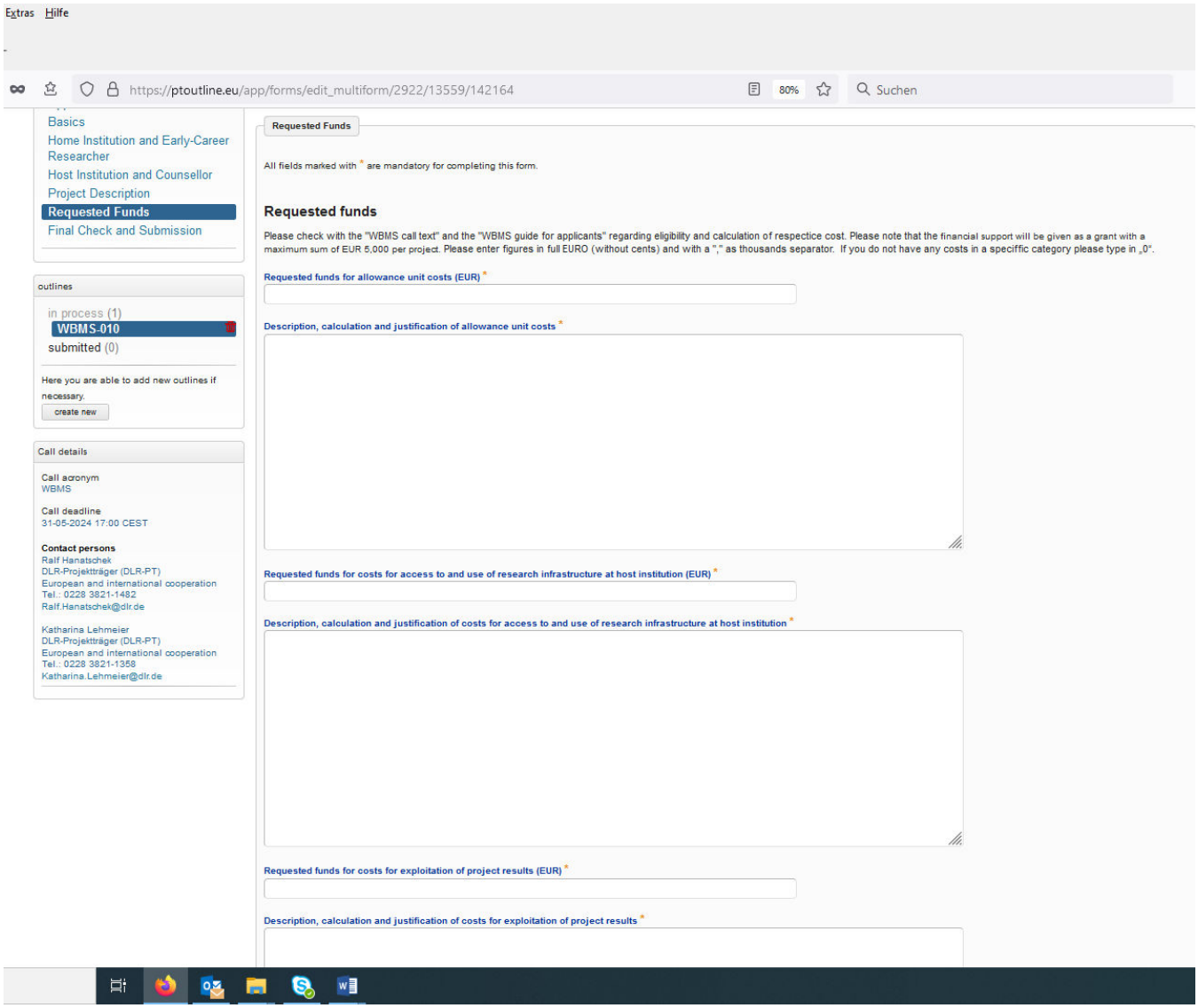

At the Requested Funds form you are asked to name the required funds in each of the three cost categories and give explanations how you calculated these amount as well as justifications for it. The three amounts are summed up automatically to arrive at the total sum requested.

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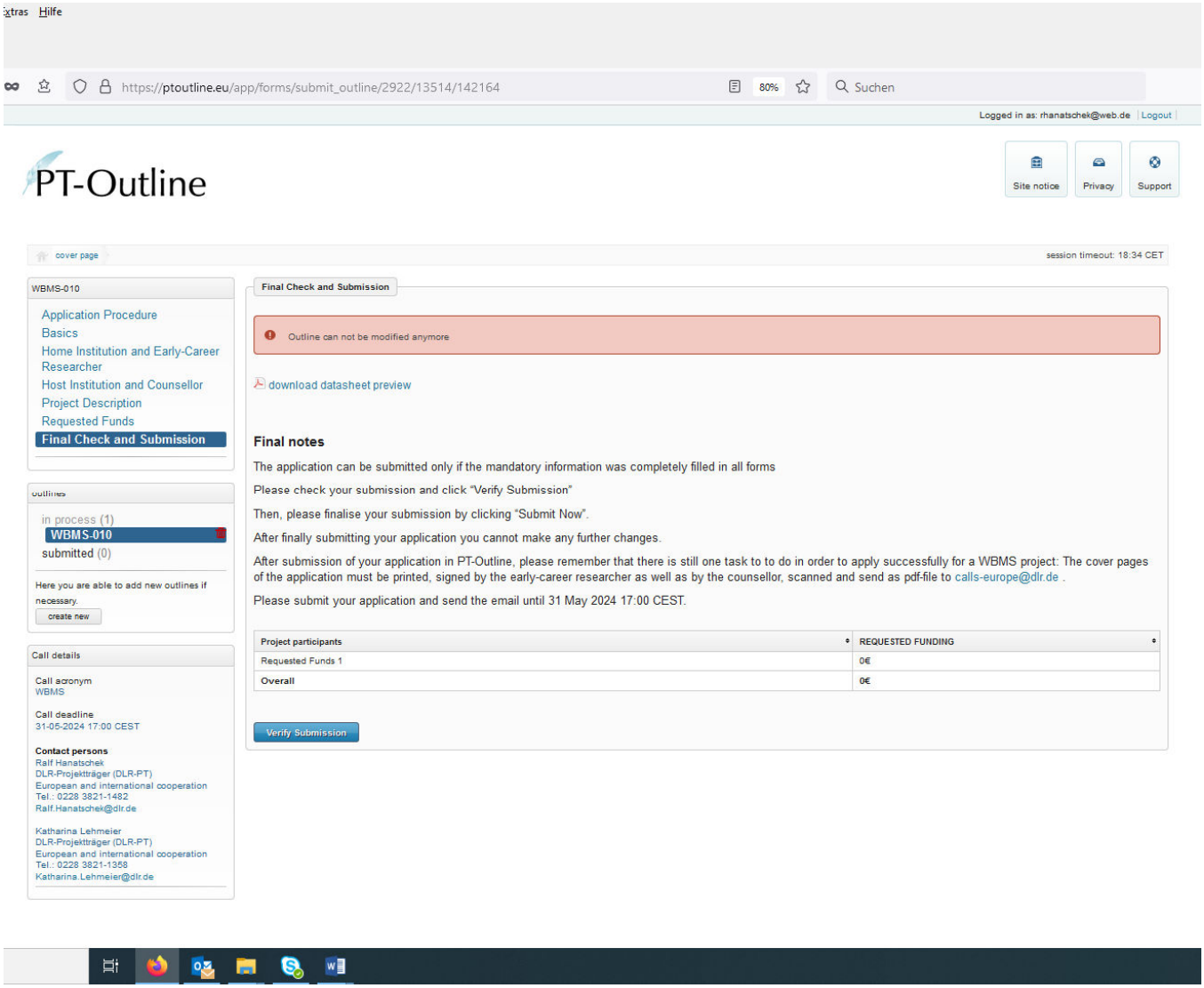

The screenshot above shows the Final Check and Submission form. This is last form, in which you are provided with an overview of the requested funds. In addition, you have the opportunity to generate a data sheet preview with all the information you have entered so far. Please make sure you read and observe the instructions set out in the checklist. Before you are able to submit your application you have to verify whether you filled all mandatory fields. Only after a successful pass you are able to submit.

After submission of your application in PT-Outline, please remember that there is still one task to do in order to apply successfully for a WBMS project: The cover pages of the application must be printed, signed by the early-career researcher as well as by the counsellor, scanned and send as pdf-file to calls-europe@dlr.de.

Please submit your application and send the email until 31 May 2024 17:00 CEST.

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Annex

A1 Financial Support Contract Form (DRAFT)
A2 Letters of Confirmation of Home and Host institution (DRAFT)
A3 Financial Support to Third Parties (FSTP) Annex to Financial Support Contract Form (DRAFT)