

## **EPOCH INTERIM BURSARY PLAN 2nd semester (October 2004 – March 2005)**

### **1. Foreword**

EPOCH's contractually planned activities include (WP4.3) "Staff mobility and bursaries", in order to "foster partners' integration facilitating staff mobility for short term visits and exchanges and supporting a bursary program for young researchers" (Attachment 1 to TA – page 82).

According to the TA, the main features of the bursaries and mobility activity are the following:

- It aims to foster integration by facilitating mobility for staff and young researchers
- Grants are issued after periodic calls, based on a plan periodically reviewed to take into account the training needs and offerings, evidenced by the training needs analysis (WP4.4) and the results of previous calls
- The selection is managed by an ad hoc selection committee
- Costs are reimbursed only in part to beneficiaries

In the first semester (March – September 2004), EPOCH has activated the Interim Bursary and Mobility Plan whose results are outlined below. As expected, it has provided suggestions to improve the plan for semester 2 (October 2004 – March 2005).

To synchronize EPOCH training plans with the academic calendar and avoid gaps, the validity of the present 2nd semester plan will extend to cover the second academic semester, and will therefore end on 31 May 2005. It is expected to have by then a new plan for semester 1 of year 2 of EPOCH's activity.

As in the 1st semester, bursaries will cover two kinds of scholarships:

- a) Attendance to short Winter courses
- b) Short secondments at a partner institution

The present plan covers also

- c) Staff mobility

As usual, a "secondment" means the activity of a research student who moves for a short period to an institution different from the one where he or she usually studies, under an agreement between the two institutions concerning his or her duties and study program; "staff mobility" concerns an employee of an institution who moves for a short period to another, under an agreement between the two institutions defining activity and tasks of the moving employee. The main difference between the two concepts is that "staff mobility" requires the existence of a work contract for the moving person – a scholarship being not sufficient to satisfy this condition.

The available (unallocated) budget for scholarships and mobility in WP4.3 for the second semester of year 1 is 25.000 Euro as the first semester. The partner in charge of coordinating the bursary and mobility activity is PIN.

### **2. Summary report of the outcomes of the 1st semester.**

As already known to partners, EPOCH launched an interim bursary plan for the first semester of its activity, spread among partners by means of a circular email and published on the web site. The interim bursary plan covered the Summer months – in practice July to September.

Almost all the EPOCH supported course took place in the month of September 2004. There were 5 courses proposed for the 1st semester, all approved. Of these, 3 were proposed by two partners presently having zero budget, showing that course support is one of the possible advantages of EPOCH membership.

In all, the courses were attended by more than 100 participants. There were 15 bids for EPOCH bursaries, 12 of which were accepted, the rejected 3 being ineligible for support. Students receiving an EPOCH fellowship came from 8 countries, 7 relating to courses and one to secondments: Bulgaria, Finland, Germany,

Greece, Hungary, Israel, Romania and Spain (the latter for a secondment). A survey is being carried on with fellows attending EPOCH courses; the preliminary results show a high level of satisfaction.

One secondment has been activated to participate in a showcase development. Also in this case, the preliminary results are very satisfactory and a scientific paper will be published as outcome of the joint research.

No staff mobility has been activated in the first semester; however, requests for the second semester have already been submitted.

The experience of the Interim Plan has suggested some modifications, in particular to the eligibility rules, which have been included in the present plan.

## **2. General criteria for the Interim Bursary and Mobility plan.**

To avoid gaps in EPOCH training support, the present plan, will concern mobility in Winter/Spring months (from 1 January 2005 to 31 May 2005). There are restrictions (see below) for courses taking place after 15/3/2004, which must be fully planned before that date in order to be accountable under the budget of year 1.

Bursaries will cover two kinds of scholarships:

- a) attendance to short Summer courses
- b) short secondments at a partner institution

Secondments must have sufficient duration for a real involvement at the hosting institution; therefore they do not include, in general, short visits, participation to seminars or conferences etc. The preferred minimum duration is 30 calendar days. However, if duly motivated, other kinds of student secondments may be taken into account, i.e. for shorter periods and with other research programs.

Eligible beneficiaries for bursaries are, according to the project contractual description, "young researchers": excluding undergraduate students and senior staff. The concept includes "early stage researchers" as defined elsewhere by the European Commission's FP6 (i.e. researchers without a PhD with maximum 4 years' activity since graduation) and may as well include PhD graduates in the early stages of their career.

Eligible researchers will be defined in the present interim plan as follows:

- researchers **having graduated since 4 years or less**, regardless of their achievement of a PhD, in the early stages of establishing a relevant inter-disciplinary research record.
- PhD students, regardless their time of graduation.

Such a definition may be revised in future bursary plans to suit better partners' needs. Suggestions in this regard are welcome.

Eligible scholarships will in general aim at overcoming fragmentation – the mission of the EPOCH project.

Eligible courses include any kind of course delivered by partners with one or more of the following features:

- 1) they have an interdisciplinary character
- 2) they foster cross-fertilization between humanists and technologists
- 3) they contribute to the necessary background to carry on EPOCH's activity
- 4) they have a trans-national approach, i.e. deal with local problems with a Europe-wide perspective (e.g. taking into account multi-cultural and multi-lingual issues, exemplarity, etc.)

Eligible courses must, moreover, be planned for the Winter/Spring period (1/1/2005 to 31/5/2005) and in principle be financially viable and take place independently of their selection for the bursary scheme. It is expected that demand will be such that any individual course will only receive a very small number of bursaries. It is imperative that the definitive planning and attendance of the course is completed before 15/3/2005 so that it may be budgeted to EPOCH's year 1.

Scholarships for secondments must follow the same rationale, and will concern participation in showcase development. This will improve the sharing of technology and applications among EPOCH partners. It will provide research training on existing technologies, immediately applicable to Cultural Heritage, for bursaries; or extension of such experiences to additional applications, for staff mobility. Staff mobility from outside the

task force developing a showcase is therefore a goal. However, other programs may be considered as well, if duly motivated within EPOCH's activity and objectives.

Assignment of bursaries for attending courses will require a two-step procedure: selection of eligible courses and selection of candidates for attendance to such courses.

Bursaries for short secondments will on the contrary be based on individual proposals.

Staff mobility proposals will be considered individually and must provide evidence that they have been organized to provide concrete results. They will consist of a relocation of 30 to 60 days and will preferentially concern staff employed at partners not involved in the specific showcase, to participate in showcase development. Also in this case, other research programs may be taken into consideration if duly motivated.

Beneficiaries must be supported by partners: bursary beneficiaries must be endorsed by a partner and relocated staff must be employed by a partner for a period longer than the mobility period. Both must be accepted by the hosting institution (secondment or mobility) or by the course organizer (course attendance).

Since the bursary and mobility plan aims at trans-national integration, no funding will be granted for mobility:

- within the home country of the beneficiary
- to a country where he/she has been a resident for study or work reasons in the last 3 years, or has graduated previously.

### **3. Detailed criteria for scholarships and mobility funding**

#### 3.1 Course eligibility

3.1.1 The course must take place in the period 1 January 2005 – 31 May 2005. Courses extending or taking place after 15 March 2005 must have been fully organized (final program, inscriptions, fee payment, etc.) before 15 March 2005 .

3.1.2 The course must be planned independently of the EPOCH bursary activity and address an audience not restricted to bursary beneficiaries.

3.1.2 The course must have an interdisciplinary character and provide basic cross-fertilization background.

3.1.3 The course duration must not exceed two weeks.

#### 3.2 Course selection

Partners organizing a course fulfilling the above criteria may propose it for selection by filling the enclosed form and adding the course program (maximum 1 A4 page) and a faculty description (maximum 1 A4 page, with 1-paragraph CV for each teacher). Proposals must be submitted by 20 December 2004 24:00 CET at the following email address:

bursaries2004@epoch-net.org

indicating "Winter course proposal" as subject and attaching the form and its annexes to the message. The text of the email is irrelevant.

#### 3.3 Scholarships

Applicants must fill the relevant enclosed form and include a letter of endorsement by a partner and the acceptance by the hosting institution (course organizer or hosting institution with agreement of the showcase leader).

They must contact personally the responsible persons to obtain such letters.

All the documentation must be sent in electronic format by 31 December 2004 24:00 CET to the following email address:

bursaries2004@epoch-net.org

indicating "Bursary application" as subject, and attaching the form and the requested annexes. The text of the email is irrelevant, please do not put in it important information.

Proposals for course attendance may concern **only** selected courses. Information concerning selected courses will be notified to all the partners as soon as possible. The list will be published on the web site and disseminated at VAST2004.

Secondment proposals may be submitted immediately, to be received no later than 31 December 2004 24:00 CET, and must concern a period of no less than 30 days and no more than 60 days.

Notice of acceptance or rejection will be forwarded to interested parties as soon as possible, in any case in time to organize course attendance.

### 3.4 Mobility

Individual staff mobility proposals may be submitted in free form, and must include:

- rationale and work program (1 A4 page)
- CV (1 A4 page)
- Copy of the authorization of the home institution
- Acceptance by the hosting institution confirming that the showcase leader agrees on the mobility

The relocation period must be longer than 45 days and shorter than 60 days.

Proposals will be assessed monthly, according to budget availability.

## 4. Grant amount

Please note that EPOCH bursaries are expected to cover only part of the costs. The remainder must be covered by the beneficiary or his/her home institution.

For travels, a low-cost airline should be chosen and second class train tickets or bus tickets will be reimbursed for internal trips. Daily allowances include urban transportation costs. Travel dates will be agreed with the applicant and may be chosen freely if this does not imply higher costs.

### 4.1 Course attendance

The grant will consist of:

- Reimbursement of course fees up to a maximum of 50% or 500 Euro, whatever less
- a lump sum of 50 Euro per day, for accommodation and meals, for a maximum of two weeks
- travel costs with a maximum of 300 Euro

In any case the bursary cannot exceed 1500 Euro.

### 4.2 Secondment and staff mobility

The grant will consist of

- a lump sum of 50 Euro per day, for accommodation and meals
- travel costs with a maximum of 300 Euro

In any case the bursary cannot exceed 2200 Euro.

### 4.3 Other costs

All other costs (e.g. health insurance, visa) are ineligible for reimbursement.

### 4.4 Documentation and cancellation

All costs must be documented and accepted in advance by the coordinating partner. The organization reserves the right of choosing an alternate cheaper travel plan.

Daily reimbursement will correspond to:

- course/secondment days
- weekends internal to course/secondment period (e.g. a two-week course will correspond to 10 days, 5 per week, of lectures + 2 weekend days between the two weeks)
- one forfeit day ONLY for the entire travel including return.

If the course takes place in a capital city (London, Paris, Brussels, etc.) per diem is increased by 25%.

All the money must be advanced by beneficiaries, except for what is directly paid by the organization (e.g. airline tickets). The reimbursement will be forwarded to beneficiaries immediately after receiving the relevant documentation (tickets, receipts, etc.) in original.

Interruption or cancellation of the bursary will be allowed only in case of force majeure and will imply proportional reimbursement. They must be agreed with the organization in advance. Unauthorized interruption or cancellation will preclude any reimbursement. It is suggested that beneficiaries provide themselves with travel insurance.

## **5 Documents checklist**

6.1 Course proposal (submitted by partners): deadline 24 November 2004

- course proposal form
- course program (1 page)
- faculty description (1 page)

6.2 Course bursary (submitted by young researchers approved by a partner): deadline 31 December 2004

- application form for course bursaries
- CV (1 page)
- Letter of approval by a partner (scan copy)
- Letter of acceptance by the course organizer (scan copy)

6.3 Secondment bursary (submitted by young researchers approved by a partner): deadline 31 Dec 2004

- application form for secondment bursaries
- CV (1 page)
- Letter of approval by a partner (scan copy)
- Letter of acceptance by the hosting partner, with acceptance by the showcase leader (scan copy)

6.4 Staff mobility (submitted by personnel employed by partners not involved in showcases): no deadline, assessed monthly but subject to fund availability

- rationale and work program (1 A4 page)
- CV (1 A4 page)
- Copy of the authorization of the home institution (scan copy)
- Letter of acceptance by the hosting institution confirming that the showcase leader agrees on the mobility (scan copy)

## **6. Gender issues**

In the first bursary and mobility plan, women participation has achieved an excellent level: 53% of the bids and 50% of the approved ones concerned women researchers. EPOCH has established at 40%, according to EU directives, the minimum level of women participation in its activity, which has therefore been reached and exceeded as far as the interim bursary plan is concerned. The only secondment has concerned a woman, so in this regard the ratio reaches 100%.

Women young researchers and female staff are particularly encouraged to participate in the present bursary and mobility plan. However, the organization reserves the right of adopting in the future positive actions in order to balance the gender ratio of the scholarships and mobility grants (point 6.6 of the Technical Annex).

## **8. Inquiries**

Questions may be sent to the following email address:

bursaries2004@epoch-net.org

stating "Question" as message subject.