



HERA

Humanities in the European Research Area

HERA Joint Research Programme “Uses of the Past” Eligibility requirements

Please note that this list may not be complete since it is updated only as information becomes available to the HERA JRP Handling Agency from the participating funding agencies. It remains your responsibility to check with your national funding agency for the most recent requirements.

This document will be updated as soon as new information is available.

Last update: 6 July 2015

Change log

Date	Details
15 January	Published
28 January	MINECO (Spain) eligibility requirements added
2 February	CNR (Italy): correction
10 February	MINECO (Spain): national contact point updated
11 February	CNR (Italy): “Avviso integrativo nazionale” and “additional forms” added
11 February	FNRS (Belgium): salary adjustments and clarifications
13 February	CNR (Italy) added in their eligibility requirements a direct link to the <i>Avviso Integrativo Nazionale</i>
19 February	MINECO (Spain): clarification added
6 July	Revisions for the Full Proposal stage in the National Eligibility Requirements of: FWF (Austria), FRS-FNRS (Belgium – Wallonia), DASTI (Denmark), AKA (Finland), DLR/BMBF (Germany), RANNIS (Iceland), VIAA (Latvia), NWO (The Netherlands), RCN (Norway), NCN (Poland), MIZS (Slovenia), MINECO (Spain), VR (Sweden), SNF (Switzerland), AHRC (United Kingdom).

General eligibility requirements

Eligibility of applicants

- Only researchers located in the following HERA countries are eligible to apply, irrespective of their nationality: **Austria, Belgium, Croatia, Czech Republic, Denmark, Estonia, Finland, Germany, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Poland, Portugal, Slovenia, Spain, Sweden, Switzerland, and United Kingdom.**
- Each Collaborative Research Project (CRP) must comprise at least **four Principal Investigators (PIs), each** based in an eligible university or a research institute **in a different HERA JRP UP country.**
- Each participating researcher (e.g. senior, post-doc, Ph.D.) must be based at an eligible institution and be considered **eligible** for funding by the funding organisation of the HERA JRP UP country where he/she works. A Ph.D. is prerequisite for application as PI, however, in some countries applicants with equivalent research experience are also eligible to apply.
- **Please read carefully the National Eligibility Requirements. If you have any queries, contact your respective national funding organisations in order to verify eligibility with regard to qualifications of applicants.**
- **A Principal Investigator (PI) can participate as a PI or Project Leader (PL) in one HERA JRP UP proposal only.**
- **The Project Leader (PL) will be one of the Principal Investigators (PI) in the CRP and will act as coordinating partner.** Each CRP will be coordinated by a **Project Leader (PL)** who is responsible for the scientific, administrative and financial coordination of the CRP.
- The consortium partners in the participating countries in the CRP will each assign per institute one **Principal Investigator (PI)** to coordinate the administrative and financial responsibilities of the CRP at the national level.
- The team of each **Principal Investigator (PIs)** may include a number of other senior and/or junior researchers carrying out the actual research planned.
- Associations with other researchers from non-HERA JRP UP countries can be mentioned in the description of the CRP (e.g. part of an advisory group), however no time or personnel costs can be budgeted for them, no associated documentation (e.g. CV, letter) can be submitted and their participation cannot be integral to the proposal.

Eligible costs

- The total budget requested from the HERA JRP **must not exceed 1,2 M€ across all participating partners.**
- CRPs must not exceed 36 months in duration. CRPs must start by June 2016 and finish by June 2019 at the latest.
- The estimated budget must be given in **Euros only** and be tabulated according to the application template provided.
- **All costs must be eligible according to national eligibility requirements.** Eligible costs will generally include direct costs such as employment costs (PL, PIs, and other Project Members, e.g. Ph.D. students, researchers, administrative personnel, etc.), equipment, travel and meeting costs,

consumables, dissemination and knowledge transfer costs as well as the overheads. Please read the National Eligibility Requirements to verify the eligibility of specific budget items according to the rules of your national funding organisation. E.g. for some countries overhead costs are not eligible. Note also that UK researchers can only request 80% of the budgeted costs (FEC). If you have any queries, contact the contact person in your respective national funding organisation.

- Projects will also be expected to engage in knowledge exchange activities regarding the outcomes of the CRPs. Costs for these activities must be included in the proposal in addition to the costs for research (subject to national eligibility rules). Please also see the section on knowledge exchange and transfer on page 3 of the HERA JRP UP Call.
- **Non-Academic Associated Partners (AP)** associated with the project cannot be funded from the CRP for their time; only their travel and subsistence costs for attending CRP-related events as well as minor subcontracting (depending on National Eligibility Requirements) can be reimbursed.
- The costs for the participation at the HERA JRP “Uses of the Past” Launch, Mid Term and Final Conferences for PL, all PIs and APs of a CRP must be included in your travel cost estimates. The conferences will each be a one and a half days event taking place in one of the HERA JRP UP countries. On average for one to two day events, costs to be budgeted per person are € 850, which means that when there are four PIs and 2 APs in a consortium on average € 15,300 must be budgeted for participating in HERA JRP UP meetings.
- Recipients of HERA JRP UP funding are strongly encouraged to use Open Access publishing wherever possible (see section 6. Open Access of the HERA JRP UP Call). If publishing under “author pays” regimes is foreseen at the application stage, the related costs should be included in the budget. Costs must be plausible and justified/substantiated. As a rule, the costs per peer-reviewed journal article should not exceed 2,500 EUR. For proceedings, collections and monographs, the total budget can be up to 15,000 EUR per project.

CONTACT:

Handling Agency for the HERA JRP Uses of the Past **(as regards general eligibility, administrative and procedural questions)**

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National eligibility requirements

National eligibility requirements are presented in the following order:

<u>Country</u>	<u>Organisation</u>
Austria	FWF
Belgium (Wallonia)	FRS-FNRS
Belgium (Flanders)	FWO
Croatia	HAZU
Czech Republic	CAS
Denmark	DASTI
Estonia	ETAg
Finland	AKA
Germany	DLR/BMBF
Iceland	RANNIS
Ireland	IRC
Italy	CNR
Latvia	VIAA
Lithuania	RCL
Luxembourg	FNR
The Netherlands	NWO
Norway	RCN
Poland	NCN
Portugal	FCT
Slovenia	MIZS
Spain	MINECO
Sweden	VR
Switzerland	SNF
United Kingdom	AHRC

Austria (FWF)

FWF Eligibility Requirements for HERA JRP UP applicants based in Austria

Who can apply?

Any researcher working in Austria who possesses the scholarly qualifications, available capacity, and the infrastructure necessary to carry out the project submitted may participate in a HERA JRP consortium as Project Leader (PL) or as Principal Investigator (PI).

The applicant's scholarly qualifications to carry out the work should be demonstrated by publications in internationally recognised journals. The number of which should correspond to the stage the applicant has reached in his/her career. However, each applicant must have at least two publications in the five years prior to submission of the application. Given the international review process, the FWF normally expects international and/or peer-reviewed publications that are recognised outside of German speaking countries and regions. In the humanities, the majority of publications should go beyond German-speaking countries and be published outside of Austria. The publications must have been subjected to a quality assurance procedure in line with high international standards, meaning that the journals must be listed in the Web of Science, Scopus or the Directory of Open Access Journals (DOAJ). In the case of monographs, anthologies or other publication types, the peer-review procedure must be documented on the publisher's website.

Applications for stand-alone projects may only be submitted by individual natural persons. Applications from institutes, institutions or companies are not permitted.

"Independent researchers" (Selbstantragsteller) are also allowed to apply within a HERA JRP. The FWF defines an "independent researcher" as a project leader whose salary is to be paid from the funding provided for the project. The prerequisite for such an arrangement is that either the researcher's main residence must have been in Austria for at least three of the past ten years at the time when the application is submitted, or the applicant must have been working continuously as a researcher in Austria for at least two consecutive years preceding the submission of the application.

What types of funding are eligible for Austrian researchers?

Only project specific costs may be requested, i.e. personnel and non-personnel costs that are essential to carry out the project and that go beyond the resources made available from the research institution's infrastructure or basic equipment at research institutions.

Eligible costs:

- Eligible personnel costs: (maximum project duration 3 years)
 - Contracts of employment (Dienstvertrag) for full- or part-time employees (Post-doc positions, PhD-student positions) according to the current FWF salary scheme including provisions for inflation. It is not permitted to apply for PhD-student positions where the extent of employment exceeds 75% (which corresponds to 30 hours per week).
 - Reimbursement for work on an hourly basis (Geringfügig Beschäftigte).
 - part-time contract of employment (DV 50%, "studentische Mitarbeit") may be requested for people who have not yet completed a master's or diploma program (Diplom) in the relevant subject.

- o Eligible material costs are e.g.:

At PL level (will be administrated by the PL)

- Travel & accommodation & meeting costs
- Costs for knowledge transfer
- All joint publication costs (incl. editing and translation costs)

At national PI level, the following costs are eligible

- Material costs, travel costs, other costs, contracts for work and services.

- o Eligible general costs:

An amount for smaller, unforeseen costs necessary for the project, such as repairs, student assistance etc. is to be calculated as 5% of the total funding requested. No justification for general costs has to be included in the written project description. Please enter this sum into budget table A under "6. Other costs" specifying "5% General Costs FWF".

Ineligible costs:

- o With the exception of projects submitted by "independent scholars", no personnel costs may be requested for PL and / or PI.
- o FWF does not pay overhead costs for HERA JRP projects.
- o FWF does not finance infrastructure of basic equipment at research institutions. This category includes all facilities that are required for the normal operations of the research institution (such as buildings, installations, communication facilities, scientific equipment considered as infrastructure etc.).

CONTACT:

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Belgium (F.R.S.-FNRS)

F.R.S.-FNRS Eligibility Requirements for HERA JRP UP applicants based in Belgium

Who can apply?

The applicant must be affiliated to a research institution from the Wallonia-Brussels Federation (FWB). The applicant should also:

- Be a permanent researcher of F.R.S. - FNRS (Chercheur qualifié, Maître de recherches or Directeur de recherches);
- Or hold a tenure track position (or an assimilated position including pending tenure track) within a research institution from the FWB;
- Or be a permanent research staff member of a federal scientific institution or of the Royal Military School (Ecole Royale Militaire) in which case he can act as a co-promotor only.

The applicant should not have reached retirement at the starting date of the project. If the applicant reaches the age of retirement in the course of the project, he/she should precisely describe in the proposal how the handover will be managed.

A single participant may only participate once in a consortium applying to this call.

What types of funding are eligible for Belgian (FNRS) researchers?

- The maximum amount to be attributed per project is 200.000 EUR for a maximum of three years. If the project involves the recruitment of a PhD student, the project duration of the F.R.S.-FNRS sub-project could be up to four years.

- The following costs are eligible:

- Costs of scientific staff
 - o Scientifique doctorant € 36.400/year
 - o Scientifique non postdoctoral € 62.000/year
 - o Scientifique postdoctoral € 72.300/year
 - o Technicien € 52.600 (full time/year) - € 26.600 (half time/year)
 - o Chercheur temporaire postdoctoral € 46.600/year

The categories « scientifique doctorant » and « chercheur temporaire postdoctoral » can only be Full time positions. The three other positions can be filled in either Full time or part-time

The usual duration of ERA-NET research programmes is three years. However, when the project involves a PhD student, the principal investigator can apply for an additional one year funding in order to complete the four years PhD programme. This request should be submitted to F.R.S.-FNRS six months before the end of the project, together with the written agreement from the "Comité d'accompagnement".

- Equipment (max. 10.000 EUR/year)
- Running costs: (max. 20.000 EUR/year): travel expenses; organisation of small scientific events in Belgium; consumables and the following support costs:
 - o Publication Designing (conception d'ouvrage)
 - o Dictionary Production (réalisation de dictionnaire)
 - o Purchase of Books
 - o Encoding

- Software Access Rights
- Congress Registration Fees
- Purchase of Computer
- Scanning

Non-permissible costs:

“Overhead” is not an eligible cost. If the project is selected for funding, these costs will be subject to a separate agreement between the institution of the beneficiary and the F.R.S.-FNRS.

Funding criteria and regulations

General rules and regulations of F.R.S.-FNRS apply: www.frs-fnrs.be

CONTACT:

Dr. Monique Septon
Fund for Scientific Research-FNRS
Rue d’Egmont 5, 1000 BRUSSELS, BELGIUM
E-mail address: monique.septon@frs-fnrs.be

Flanders (Belgium) (FWO)

FWO Eligibility Requirements for HERA JRP UP applicants based in Flanders

Who can apply?

Art. 9 of the FWO-regulation on the regular research projects is applicable. In this article is stated who can apply as a Principal Investigator for a research project:

- an Independent Academic Staff (ZAP) member with an appointment of more than 10% at a Flemish university;
- an Independent Academic Staff member with an appointment of 10% at a Flemish university and whose main task is research;
- an Independent Academic Staff member with an appointment of 5% at a Flemish university and with an appointment as (assistant) clinical head or an equal function in a university hospital;
- an academic staff member with an appointment at the Evangelical Protestant Faculty in Leuven and the Faculty for Protestant Theology in Brussels;
- a research director of the FWO;
- a designated beneficiary of an ERC Starting Grant, an ERC Advanced Grant or an Odysseus II grant, with a Flemish university as a host institution.

If more than one university is involved in the project, at least one promoter of each university has to fulfill the above mentioned eligibility criteria as well as to occupy a position covering entirely the period of the project that is applied for.

The criteria have to be met with at the start of the project at the latest, which has to be proven at the date of the submission.

What types of funding are eligible for Flemish researchers?

Funding money can be used for staff, consumables and infrastructure. The minimal and maximal amounts of money allowed per cost category, as applicable for the regular FWO-projects, are not applicable for the projects funded by FWO in ERA-NET. Moreover, FWO pays the host institutions of a project 6% overhead on top of the funding amount.

Funding cannot be used for training activities, apart from the opportunity for a researcher appointed within the project to obtain a PhD on the basis of the results from his/her project research.

CONTACT:

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Fonds Wetenschappelijk Onderzoek – Vlaanderen (FWO)
Egmontstraat 5
B-1000 Brussel

Toon Monbaliu

E-mail address: eranet@fwo.be



Croatia (HAZU)

HAZU Eligibility Requirements for HERA JRP UP applicants based in Croatia

Who can apply?

- PL/PI* must hold a Ph.D. degree from the humanities;
- Other project members can have a Ph.D. from other scientific disciplines, but their research must be closely connected to the humanities;
- PL/PI should have at least 3 years of experience after Ph.D. (usually assistant professor/research associate level);
- PL/PI** must be supported by a legally established host institution (institution entitled to receive the HERA JRP grant on behalf of the PI/PL) and must be permanently employed;
- Other project members must also be employed, either permanently or on definite time, by the host institution. For the purpose of the project, project members from other institutions must conclude an agreement with the host institution.

All project members must provide a letter of the institutional support with all information as above. The letter should also indicate that PL/PI would devote 40% of their work time to the research on the HERA project.

*Exceptionally PL/PI holding a Ph.D. from social sciences will be allowed, under circumstances that the proposed project is exclusively humanities-led.

**Exceptionally PI can be a person holding a working contract on a definite time, but s/he has to be strongly supported by a host institution to apply for the HERA JRP UP project as a PI.

What costs are eligible for Croatian researchers?

ELIGIBLE PERSONNEL COSTS***

Personnel costs should/can include:

- gross salary (bruto 2)
- allowance for the transport and/or other allowances
- costs of the doctoral studies (for Ph.D. student(s))
- additional honorarium in the amount of up to 30% for researchers (other than researchers employed exclusively on the HERA projects)
- -personnel costs for a project manager (either part or full time employment)

*** All personnel costs have to be calculated in accordance with the valid national legislation and checked at the financial department of the host institution. The calculations for newly employed researchers should follow the financial grades for assistants (for Ph.D. students) or postdoctoral researchers (for postdocs). Legal and/or HR department of the host institution should be contacted for the employment regulations.

OTHER ELIGIBLE COSTS

- all costs related to travel (accommodation, transport, daily allowances, registration fees), incl. the costs for the participation at the HERA JRP "Uses of the Past" Launch, Mid Term and Final Conferences for PL and PI(s) and non-academic associated partners (AP). Calculations for travel provided in the general part (guidelines for applicants) of the call should be respected.

- meeting/seminar/conference organizational costs (rents of the venue and/or technical equipment, consecutive/simultaneous translations, catering);
- subcontracting costs for the above listed organizational services (should be justified);
- all costs related to the field work;
- all joint publication costs (incl. editing and translation costs). Open Access publishing is especially encouraged:
- research results dissemination, knowledge transfer;
- consumables;
- equipment (computers, lap tops, cameras, etc.);
- all other material costs related to research.

ELIGIBLE INDIRECT COSTS

- Overheads - up to 15% of all costs

Overheads costs should cover all costs for gas/electricity/water/telephone/internet related to the project, employment advertisements, costs related to public procurement (if needed), financial services costs, etc.

INELIGIBLE COSTS:

- All costs not listed above

The proposed project should not be financed from any other domestic or foreign source.

All budget items must be justified and provided for eligibility.

Consumables, equipment and material costs should be made during the period of the project duration.

Applicants are advised to contact the national contact point for the pre-eligibility check.

CONTACT:

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Croatian Academy of Sciences and Arts
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Czech Republic (CAS)

CAS Eligibility Requirements for HERA JRP UP applicants based in Czech Republic

Who can apply?

To participate in a HERA JRP CRP consortium as Project Leader (PL) the applicant must be at the level of a senior researcher.

To participate in a HERA JRP CRP consortium as Principal Investigator (PI) the applicant may be at any career stage beyond being awarded a PhD or equivalent qualifications.

What types of funding are eligible for Czech researchers?

Only project specific costs may be requested, i.e. personnel and non-personnel costs that are essential to carry out the project and that go beyond the resources made available from the research institution's so-called "infrastructure".

What are eligible costs for Czech researchers?

- Eligible personnel costs: (maximum project duration 3 years)
 - One or more PhD.(s);
 - One or more Postdoc(s);
 - One or more senior researcher(s).
- Eligible material costs are e.g.:
 - Travel & accommodation & meeting costs;
 - Costs for knowledge transfer;
 - All joint publication costs (incl. editing and translation costs);
 - Overhead/administration expenses;
 - Equipment expenses (contact CAS to check eligibility of proposed equipment costs);
 - Other material costs (contact CAS to check eligibility of proposed material costs).

The cost of institutional overheads may be included at a rate of up to 15% of overall eligible direct costs less equipment.

The proposed project should not be financed from any other domestic source.

All budget items must be justified and provided for the eligibility.

CONTACT:

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Czech Republic

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Denmark (The Danish Council for Independent Research)

Eligibility Requirements for HERA JRP UP applicants based in Denmark

Who can apply?

To participate in a HERA JRP CRP consortium as Project Leader (PL) you must be at the level of a senior researcher.

To participate in a HERA JRP CRP consortium as Principal Investigator (PI) you may be at any career stage beyond being awarded a PhD or equivalent qualifications.

What are eligible costs?

Maximum amount to be funded per project is 252.000 € including overhead.

You may apply for funding to cover expenses that are directly attributable to the suggested project and which are relevant and necessary in order to carry out the project, such as

- Scientific/academic salaries (incl. salaries for PhD-students and postdoctoral scholarships and foreign visiting researchers)
- Technical/administrative salaries
- Equipment expenses
- Operating expenses (e.g. for data collection, hosting of scientific conferences, seminars etc.)
- Overhead/administration expenses.

Calculation of overhead/administration expenses must follow the rules applied by The Danish Council for Independent Research, i.e. grants administered by Danish state institutions, including Danish universities, subject to the rules regarding grant-funded research activities in the Danish Ministry of Finance's budget guidelines ("*budgetvejledning*"), are to include an overhead contribution of 44 per cent of the Research Council's share of the direct expenses. (*Example*: Having applied for 252.000 € including 44 per cent overhead, direct costs would be 175.000 € and overhead 77.000 €.)

For other Danish public institutions, including regional and municipal institutions, 3.1 per cent of the direct expenses may be calculated for administration expenses.

The Danish Council for Independent Research's rules for budgeting etc. described in the DFF Call for proposals A2015 and S2016, Appendix C, are to be followed:

http://ufm.dk/forskning-og-innovation/tilskud-til-forskning-og-innovation/opslag/2015/filer/2015_07_02_a2015_s2016_final_version_english.pdf

Non-permissible costs:

The Danish Council for Independent Research does not request "author pays" Open Access and does not cover any costs in this context.

The budget:

The application must include a budget, using the mandatory HERA budget templates. C3.1 and C3.2 are obligatory, and C3.3 is obligatory if applicable.

The total requested HERA funding, as entered in the mandatory budget template, must observe the upper limit of 252.000 € including overhead per project.

CONTACT:

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Estonia (ETAg)

Eligibility Requirements for HERA JRP UP applicants based in Estonia

National Eligibility Criteria of project proposal in international calls

Estonian Research Council funds basic and applied research in terms of Organisation of Research and Development Act.¹

Proposals may be submitted by the Estonia based research and development institutions in terms of Organisation of Research and Development Act:

1. Participants in the grant project

1.1. The Principal Investigator

- 1.1.1. Principal Investigator is the applicant of the grant, to whom the grant has been allocated within an open competition and who shall be responsible for the use of the grant for specified purpose and for the productive realisation of the grant project. The Council shall enter into a grant agreement with the Principal Investigator.
- 1.1.2. Has as a rule entered into an employment relationship with the legal person (hereinafter Institution), which is the basis of the realisation of the grant project and through which the grant shall be allocated to the Principal Investigator.
- 1.1.3. Must be a holder of the doctoral degree of Estonia or an equivalent academic degree (both awarded by the deadline of submission of the grant application, at the latest).
- 1.1.4. Must have published within the last five years prior to the proposal's submission deadline at least three publications, which comply with the requirements of clauses 1.1 of the classification of publications of the Estonian Research Information System² (ETIS), or at least five publications, which comply with the requirements of clauses 1.1, 1.2, 2.1 and 3.1 of the classification of publications of the ETIS; the monographs are equalised to each author with three publications mentioned in clause 1.1 if the number of its authors is three or less. If the applicant has been on the parental leave or in the compulsory military service within these last five years, the deadline of the publication requirement shall be extended by the time stayed on the parental leave or compulsory military service.

1.2. The main participant of the project

- 1.2.1. The main participant of the project is a person who participates in the substantial performance of the project.
- 1.2.2. The main participant of the project shall either possess at least the master's degree or the respective qualification and must have published at least one publication within the last three years prior to the proposal's submission deadline, which comply with the requirements of clauses 1.1, 1.2, 2.1 or 3.1 of the classification of publications of the ETIS; or be a doctoral candidate.

¹ Teadus- ja arendustegevuse korralduse seadus (Vastu võetud 26.03.1997, <https://www.riigiteataja.ee/akt/113032014065>)

² Web-site in Estonian: <https://www.etis.ee/otsingud/classification.aspx>

2. Budget

- 2.1. A budget of proposal shall consist of the research expenses and the overhead costs of the institution, through which the grant project is to be carried out.
- 2.2. The research expenses consist of personnel costs (incl. scholarships), travel costs, other direct costs and subcontracting costs. The expenses on research are clearly required to carry out the project and respectively identifiable.
- 2.3. Remuneration may be only paid out of the grant to the Principal Investigator, main participants in the project and auxiliary staff according to the time they participate in the grant project and their total salary cost for Institution.³ Double funding of activities already have contributions is not acceptable.
- 2.4. Scholarship equal to the state grant may be paid out of the grant to doctoral and master's candidates not paid any salary by Institution. The scholarship for a master's candidate may not exceed 300 euros and for a doctoral candidate 400 euros a month. The scholarship of the doctoral candidate along with the State education allowance may not exceed 600 euros a month. Should a doctoral or master's candidate participate in several projects financed by the Council, the total amount of the scholarship received from different projects may not exceed the aforementioned amounts. It means that maximum of the scholarships per doctoral candidate and master's candidate are respectively annually 4800 euros and 3600 euros.
- 2.5. Travel costs cover expenses for transport, accommodation and daily allowances (except in case of internal travel).
- 2.6. Subcontracting costs cover generally only additional or complementary tasks (e.g. costs for translation, analyses, etc.) to the third parties. Core project research tasks should not be subcontracted.
- 2.7. Other direct costs are:
 - 2.7.1. Consumables related to the project
 - 2.7.2. Costs for publishing and dissemination of project results (fair distribution of costs between partner should be followed);
 - 2.7.3. Costs for organising the meetings/seminars/conferences (only in Estonia)
 - 2.7.4. Fees for participating in scientific forums and conferences;
 - 2.7.5. All other costs which are clearly required for the implementation of the project and respectively identifiable.
- 2.8. Overhead costs of the institution must not exceed a maximum of 20% of eligible direct costs and should be cover general expenses of the institution.
- 2.9. Participants' personal expenses or expenses not directly related to the project are not eligible, including costs for equipment and services intended for public use (copying machine or printer publicly used, phone bills, copying service, etc.). Such expenses shall be covered from the overhead fee.

³ comprising basic monthly salary plus social security charges and other statutory costs

3. Human research or animal tests

3.1. If a human research or animal tests are intended in the research project, the positive resolution of the Ethics Review Committee or permit committee of the conduct of animal experiments with respect to the performance of the project addressed to the Council shall be submitted before the funding decision is made.

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Finland (AKA)

AKA Eligibility Requirements for HERA JRP UP applicants based in Finland

General guidelines of the Academy Projects funded by the Academy of Finland will be applied to applicants based in Finland. See the Academy of Finland September 2015 Call document at <http://www.aka.fi/en/funding/how-to-apply/call-texts/>

Applicants are strongly encouraged to contact the HERA national contact point at the Academy of Finland (contact details below) before submitting their proposals.

Who can apply?

The applicant who intends to act as project leader (PL) or principal investigator (PI) in a HERA JRP UP consortium must have the qualifications of a professor or adjunct professor. The funding is granted primarily to teams composed of researchers who have completed their doctorate.

What are eligible costs for Finnish researchers?

Funding can be used to cover both direct and indirect research costs of the research team arising from, for example, the following:

- the research team's work (salaries)
- research costs
- travel
- national and international collaboration and mobility
- preparation of international projects
- publishing costs (e.g. open access publishing using the golden route)

Funding is primarily intended towards the salaries of researchers who work full-time on the project and for other project costs. The salary costs of the PL/PI can, with certain limitations, be incorporated into the total project costs. The PL/PI can also be granted funding for salary costs, but only for well-substantiated research-related reasons which must be explicated in the proposal.

The annex 2 of the Full Proposal (commitment statement from the host institution) should contain the elements of commitment statements of the Academy Projects. Model for commitment statement of a Finland-based sub-project is available from the HERA national contact point.

Guidelines for drawing out budgets and filling out the PI budget tables and summary budgets:

- Full cost model is applied to the funding granted to consortium sub-projects based in Finland. The requested funding may cover a maximum of 70% of the total costs of the sub-project.
- Budgets must be drawn out using the indirect employee costs, the overheads, and the coefficient for effective working hours applied by the site of research at the time of application submission (check the percentages for indirect employee costs and overheads as well as the coefficient for effective working hours from your organisation).
- Fill out the indirect employee costs and percentage for indirect employee costs using a separate row in item 1 (employment costs) in the PI budget table.
- Fill out overheads and overheads percentage in item 7 in the PI budget table.
- Filling out funds from the site of research (own funds) and other additional funds is obligatory for both PI budget table and summary budgets; applicants are required to fill out these at the level of the total project costs, not according to each budget item.

Examples of PI budget tables and summary budgets for the sub-projects based in Finland are available from the HERA national contact point.

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Germany (BMBF)

BMBF Eligibility Requirements for HERA JRP Uses of the Past applicants based in Germany

Preliminary note

Generally, any researcher from a German institution funded within a HERA JRP project must comply with the habitually used regulations for scientific funding of the German Ministry of Education and Research (BMBF). These regulations (those valid for projects on Ausgabenbasis are: Richtlinien für Zuwendungsanträge auf Ausgabenbasis, ANBest-P, BNBest-BMBF 98; those valid for projects on Kostenbasis are: Richtlinien für Zuwendungsanträge auf Kostenbasis, Merkblatt Vorkalkulation für Zuwendungen – Kostenbasis, NKBF 98) can be found on:

www.foerderportal.bund.de/easy/easy_index.php?auswahl=easy_formulare&formularschrank=bmbf&menue=block.

If there are explicit regulations within the HERA JRP which do not correspond with the BMBF-regulations HERA JRP rules prevail. For example, funded projects have to follow only the given HERA-reporting rules.

German national eligibility as to who may apply and which costs are eligible should be checked with the HERA contact persons at DLR Project Management Agency before a consortium submits the HERA JRP Outline Proposal to the HERA JRP electronic proposal submission system. If a consortium is invited to submit a Full Proposal, the German Principal Investigators (PI or PL) have to deliver a stamped commitment letter from the appropriate authorities of their university/research institution (“Annex 2” to the proposal, “statement from the host institution”): Officially, it’s not the researcher but his/her institution that applies. A confirmation of additional contribution to the CRP budget is needed in the case of commercial enterprises not eligible for 100% funding.

Who can apply?

Any scholar working in Germany for universities (Universitäten and Fachhochschulen), research institutions or research museums, who has reached at least post-doc level at the moment of application and is able to produce scientific contributions for a Collaborative Research Project (CRP) and who has proved his/her scientific capacity in prior publications. Applicants who have these necessary qualifications, the required infrastructure and sufficient free capacity to carry out the project for which support is requested, may participate in a HERA JRP CRP consortium as Project Leader (PL) or as Principal Investigator (PI). Applications from independent scholars are not admitted.

What types of funding are eligible for German researchers?

Only project specific costs may be requested, i.e. personnel and non-personnel costs that are essential to carry out the project and that go beyond the resources made available from the research institutions so-called “infrastructure”.

Eligible personnel costs

Personnel costs are costs for scientific or administrative personnel and for other supporting staff (temporary employees etc.) to the extent they are employed on the research project. Double funding is prohibited.

Eligible are:

- Contracts of employment (Dienstvertrag) for full- or part-time employees in PL or PI position. Any institution that employs researchers who want to participate as active investigators in PL or PI position may request costs to finance their absence.
- Contracts of employment (Dienstvertrag) for full- or part-time employees (Post-doc positions, PhD-student positions, administrative positions).
- Reimbursement for work on an hourly basis (Geringfügig Beschäftigte / Hilfskräfte).

Please note:

- Substitutes for teaching will be admissible for smaller parts of the professorial workload only and as long as wages do not go above EG 14. Replacement grants in the form of "Vertretungsprofessuren" will not be funded.
- PhDs must obtain employment contracts (at least 0.5 FTE of EG 13), not grants.
- PI/PL with 100% third-party funding must have the agreement of the funder to be involved in further projects (to be documented in Annex 2 of the proposal).

Eligible material and other costs:

- Events:

In general, all costs directly related to the preparation and the implementation of events like workshops, conferences etc. are eligible. Costs for the events should preferably be requested by the partner in the hosting country.

- Travel:

Travel and accommodation costs are eligible. Occurring costs must be appropriate, i.e. they have to correspond with travel costs for comparable personnel in Germany (cp. Bundesreisekostengesetz (BRKG)). Journeys to non-European countries must be announced in the proposal to be eligible.

- Consumables and supplies:

Any consumables necessary for the implementation of the project may be considered as direct eligible costs. Consumables are only eligible costs under the project if bought during the project period.

- Costs for infrastructure and durable equipment:

BMBF does not finance infrastructure or basic equipment at research institutions. This category includes all facilities that are required for the normal operations of the research institution (such as buildings, installations, communication facilities, scientific equipment considered as infrastructure, workplace & equipment and so on).

- Subcontracting:

The general rule is that applicants shall implement the CRP and shall have the necessary resources to that end. However, as an exception certain parts that are not "core" parts of the project may be subcontracted. Subcontracting will only be eligible for support services like rent of locations, translation costs, costs for technical equipment in the context of the organisation of events or printing services etc.

Eligible indirect costs:

- In Germany institutions are not allowed to charge overheads (a certain percentage of the eligible costs as indirect costs). However, applicants may request the concrete costs mentioned above (consumables, other costs etc.). Alternatively, they may request up to 10% of the personnel costs as a lump sum (see p.7 / point 0842 in Richtlinien für Zuwendungsanträge auf Ausgabenbasis).
- So-called "grundfinanzierte Einrichtungen" - institutions publicly funded e.g. on federal, provincial or municipal level (except for universities) - may claim an infrastructure flat rate of up to 10 % of personnel costs. (Exact details see p.7 / point 0842 in Richtlinien für Zuwendungsanträge auf Ausgabenbasis).
- Universities (Universitäten and Fachhochschulen) where HERA-research projects are realised may receive a general contribution (Projektpauschale) amounting to 20% of total eligible costs of the funded project (see p.8. / point 0865 in Richtlinien für Zuwendungsanträge auf Ausgabenbasis). Please note: In case a university claims not to opt for the Projektpauschale or opts to claim less than 20 %, an explanation is to be given in "Annex 2" to the proposal (see above "stamped commitment letter").

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Iceland (RANNIS)

RANNIS Eligibility Requirements for HERA JRP UP applicants based in Iceland

Who can apply?

Senior researchers who have acquired recognized experience in research and the management of large research projects may participate in a HERA JRP CRP consortium as Project Leader or as Principal Investigator. Principal Investigators (PIs) must have completed their graduate studies at an internationally accredited university.

Researchers not formally affiliated with an institution recognised by RANNIS may be part of a HERA JRP consortium but can not function as formal project leader (PL) or principal investigator (PI).

What are eligible costs for Icelandic researchers?

- Eligible personnel costs: (maximum project duration 3 years)
 - one or more PhD(s)
 - one or more Postdoc(s)
 - one or more senior researcher(s)

- Eligible material costs are e.g.:

At CRP level (will be administrated by the PL)

- Travel & accommodation & meeting costs
- Costs for knowledge transfer
- All joint publication costs (incl. editing and translation costs)

At national PI level, the following costs are eligible

- Other material costs (contact RANNIS to check eligibility of proposed material costs)

In accordance with the RANNIS-Icelandic Research Fund Rules and Guidelines overhead and facilities are recognized as eligible cost up to 25% of total cost.

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Ireland (IRC)

IRC Eligibility Requirements for HERA JRP UP applicants based in Irish Institutions

Who can apply?

Project Leaders (PL) and Principal Investigators (PI) shall be full-time members of the academic staff, either permanent or on temporary contracts of sufficient duration to cover the period of the proposed project, of a third-level institution within the meaning of Section One of the Higher Education Authority Act, 1971 and/or in receipt of public funding as approved by the Minister for Education and Science for the purposes of the Free Fees Initiative. Applications will also be accepted from permanent members of the academic research staff at the Economic and Social Research Institute (ESRI) and the Dublin Institute for Advanced Studies (DIAS).

Researchers not formally affiliated with an institution recognised by IRC may be part of a HERA JRP consortium but cannot function as formal project leader (PL) or principal investigator (PI).

Eligible costs:

Eligible personnel costs for the purpose of the HERA JRP must be sought at agreed national rates. These are available at: <http://www.iaa.ie/research-innovation/researcher-salary-scales/>

Total personnel costs must not exceed the following limits over the **maximum project duration**

- one or more Postgraduate / PhD Candidate(s):
maximum eligible costs per person € 93,000
- one or more Postdoctoral Fellow(s):
maximum eligible costs per person : € 160,000
- one or more senior researcher(s):
maximum eligible costs per senior researcher (replacement costs) € 126,000

Eligible material costs can include:

- Travel & accommodation & meeting costs
- Costs for knowledge exchange
- All joint publication costs (incl. editing and translation costs)
- Other material costs, equipment where justifiable
- Consumables

The cost of institutional overheads may be included at a rate of up to 20% of overall direct costs less equipment.

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Italy (IT)

CNR Eligibility Requirements for HERA JRP UP applicants based in Italy

Who can apply?

Any university, public research institution and research organisation as defined by Art. 83 of Regulation (EC) No. 651/2014 or any other legal entity that owns the requirements indicated by the “Avviso integrativo nazionale”, providing that they have stable organization in Italy. Institutions and offices of the Ministry for Cultural Heritage and Activities and Tourism can also apply. It is necessary that applicants consider carefully the corresponding Italian eligibility requirements as mentioned in the “Avviso integrativo nazionale”.

All the above listed entities that have the mandatory qualifications, the required infrastructure and sufficient free capacity to carry out the project for which support is requested, may participate in a HERA JRP UP CRP.

Each entity must individuate among its employees (professor, senior researcher, post-doc, PhD or equivalent qualifications) a Project Leader (PL) or Principal Investigator (PI).

Applications from independent scholars are not admitted.

What costs are eligible for Italian researchers?

Please consider the costs included in DM 115/2013 as listed in the “Avviso integrativo nazionale”. For preliminary information, they are:

- Personnel Costs. For calculating the personnel costs, please check the different conditions of salaries with the financial department of your institutions and universities.
- Equipment. They do not include the durable equipment required for normal operations of the entities.
- Subcontracting. The general rule is that applicants shall implement the CRP and shall have the necessary resources to that end. However, as an exception certain parts that are not "core" parts of the project may be subcontracted.
- Management of the project (only for PL).
- Communication and dissemination (including editing and translation costs). Open Access publishing is especially encouraged.
- Other costs (i.e. travel costs, meetings/events organisation and materials directed related to the research activities).
- Overheads (50% of the personnel costs).

Only project specific costs may be requested, i.e. personnel and non-personnel costs that are essential to carry out the project and that go beyond the resources made available from the entities. The proposed project should not be financed from any other domestic source. All budget items must be justified and provided for eligibility.

Funding level

70% of all eligible costs.

Additional forms

All Italian participants must send to CNR a set of additional national documents as defined in the “Avviso integrativo nazionale” published on the CNR website.

The national additional documents must be sent to CNR by the end of the outline proposal phase, i.e. by 9 April 2015. Any participant who does not send its national documents by this deadline, will be considered ineligible.

The criteria and provisions provided herewith are intended only for informative purposes. The complete list of legally valid criteria and provisions, which must be respected by all Italian

participants, is included in the “Avviso integrativo nazionale”, published on the CNR website (http://www.dsu.cnr.it/?page_id=239) and also on the MIUR website (<http://www.ricercainternazionale.miur.it>) as well as in the applicable Italian laws.

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Latvia (VIAA)

VIAA Eligibility Requirements for HERA JRP UP applicants based in Latvia

Who can apply?

Researchers actively working at Latvian scientific institutions or companies may participate in a HERA JRP CRP consortium as Project Leaders (PL) or as Principal Investigators (PI), based on their affiliation with an eligible beneficiary organisation (Latvian beneficiaries are organisations). The beneficiary organisation must be an eligible scientific institution or company: a scientific institution must be entered into the Registry of Scientific institutions of Latvia. Enterprises are eligible only if entered into the Latvian Commercial registry, assumed they are eligible to do the specific research and have proven resources for specific activities. Limitations of EU legislation apply (R651/2014) together with financial reporting requirements and support rate limits. Project leader and the principal investigator should be researchers according to Latvian legislation ("zinātnieks") possessing doctoral degree and experience in relevant research field, and the work carried out should be research.

Activities subject to any of EU and Latvian state aid legislation, control, scrutiny and/or reporting cannot be supported. Support is provided according to Provisions Nr 414, 19.06.2012 of the Latvian Cabinet of Ministers <http://www.likumi.lv/doc.php?id=249571> and respective successor provisions where applicable. Provisions should be respected without exceptions.

What are eligible costs for Latvian researchers?

- Personnel incl. social tax for PL/PI and team members
- Consumables
- Subcontracts and external services - up to 25%, needs detailed justification. Includes all publishing and patenting costs, knowledge engineering and dissemination services
- Equipment (only depreciation costs)
- Replaceable un fully consumable during project components of equipment fully, if proven by technical certificates
- Travel (according to travel plan)
- Indirect costs (up to 20%, the indirect nature of cost positions must be proven)

Core activities cannot be subcontracted.

At maximum two teams from Latvia allowed per project. Maximum grant per Latvian team is 210 TEUR (70 TEUR/year). The applicants should be able to prove the direct connection between expenses and the project's results; funding of cost positions not related to the project is not allowed; time sheets and invoices should correspond to the actual national legislation. Two teams from the same beneficiary organization are not allowed in the same project. At the moment of project's submission the Latvian PI(PL) and main collaborators in the team must be members of the beneficiary organization's staff. At the moment of particular activity start team members involved must be employed at the beneficiary organization. Associate partners as well as activities involving them are not funded. Educational activities are not supported. Funding release is subject to annual and final audits which can invoke a sworn auditor.

The grant will be awarded after the following steps are accomplished:

- the submitted project proposal with a PL/PI affiliated with an eligible Latvian beneficiary organization is in accordance with the criteria in the present document;
- the respective project proposal is selected for the award by the transnational evaluation procedure;
- the project Consortium Agreement is signed.

The decision will be made by the HERA JRP UP Board on the base of the project ranking list and recommendations by the transnational evaluation procedure. The available budget will be taken into account.

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Lithuania (RCL)

RCL Eligibility Requirements for HERA JRP UP applicants based in Lithuania

Who can apply?

Researchers from Lithuanian higher education and research institution (which is listed in the Register of Ministry of Education and Science of Republic of Lithuania) may participate in HERA JRP UP consortia. The applicant who intends to act as a project leader (PL) or principal investigator (PI) has to be a scientist (researcher holding at least a Ph.D. degree). A person, acting as a PL, PI or a core group member can participate only in one proposal per Call.

What are eligible costs for Lithuanian researchers?

Eligible direct costs for Lithuanian researchers:

- Personnel
- Subcontracting
- Consumables
- Travel and Subsistence
- Equipment
- Other

Overheads:

- Up to 30% of Personnel and Subcontracting costs.

The workload of the core members of Lithuanian team must be at least 20 hours multiplied by the duration of the project in months.

One project can require up to € 68 000 for a maximum of three years in Lithuania.

Links to further information or documents:

This is not a comprehensive list of requirements for the Lithuanian participants. All national rules are presented in the Lithuanian language in the call text and Rules for Financing ([Lietuvos mokslo tarybos mokslo ir sklaidos projektų konkursinio finansavimo bendrosios taisyklės](#))

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Luxembourg (FNR)

FNR Eligibility Requirements for HERA JRP UP applicants based in Luxembourg

Who can apply?

Funds provided by FNR in the framework of HERA project funding are aimed at beneficiary organisations as specified in article 3.2 of the law creating the FNR (version 27.8.2014). Researchers not formally affiliated with an institution eligible at the FNR may be part of a HERA JRP consortium but cannot function as formal project leader (PL) or principal investigator (PI). Non-academic partners may be part of a HERA JRP consortium as Associated Partners but cannot function as formal Project Leader (PL) or Principal Investigator (PI). The PI must be employed at an eligible beneficiary organisation at the time of the start of the project and for the full duration of the research project. The PI must be an experienced researcher who holds a doctoral degree.

For PIs not holding a doctoral degree equivalent research experience might be accepted.

The coordinating institution is expected to provide documentation demonstrating the PIs

research and project management experience. A copy of each submitted application (outline and full proposal) via the HERA website must be sent for information to FNR within 5 working days after the deadline.

What are eligible costs for Luxembourgish researchers?

Personnel costs (maximum project duration 3 years)

The payroll costs of all staff (including PhDs), full or part-time, who work on the project, and whose time can be supported by a full audit trail may be included. The need for such staff should be justified in the application form. Additional costs (overhead, consumables, etc.) for PhD students are eligible project costs. The FNR will not cover costs of persons already funded by the State or by other funding sources.

Other sources of funding for PhDs can be institutional funds or AFR grants. The FNR encourages the involvement of (Bachelor or Master) students in the project in order to strengthen their interest in research.

The FNR will only finance the profiles of the personnel indicated in the budget sheets of the application and changes of profile (e.g. Post-doc to technician) have to be requested in writing in advance and receive formal approval by the FNR.

Lump sums for staff categories may be used provided these are based on a real-figure calculation (which must be added and explained in the application form).

The FNR expects project staff to use timesheets so that their actual time is recorded against a project to form the basis of the costs charged. Where a person is contracted to work 100% of their time on a single project (whether they are working full-time or part-time), timesheets are not necessary as their costs can only be charged to that activity. In all other cases, timesheets or project time records are required. This includes those who may be contracted to work on two or more projects, since it is essential when charging to have a means of recording and verifying the actual time applied to each activity.

Equipment

The FNR will only finance equipment listed in the original proposal. Additional equipment has to be requested in writing in advance and receive formal approval by the FNR.

Consumables

The applicant needs to indicate the nature of the consumables and justify the estimation of the total costs. Lump sums for various consumable categories may be used provided these are based on reasonable assumptions.

Travel Costs

The FNR will cover the real expenses for travel, subsistence and conference fees. Expenditures should be in accordance with an institution's own regulations.

To avoid administrative burden at submission and in order to give the applicant team the necessary flexibility, the budget for travel expenses, subsistence and conference fees is calculated on a lump sum basis: 2000 € per year and per 12 person*months (in relation to the total project effort).

If the project team requires a higher budget for travel, please justify in detail the amount.

Subcontracting

This line provides for expenditure on services provided by subcontractors. Contracting partners may subcontract specific services (limited in time) which are essential for the project but do not represent core elements of the project work which cannot be directly assumed by one of the contracting-partners and where this proves necessary for the performance of their work under the project. In case the subcontracted service fulfils these criteria, please describe the service, indicate the price (market price) and specify the reason why you resort to a third service in the application form:

Why an expert or technical assistance is needed.

How many hours" work the subcontractors are expected to provide.

All covered costs, must be substantiated.

Indirect Costs

Overhead

This heading may provide for ongoing expenses which cannot be attributed to any specific activity, but are still necessary for the action to be realised.

Overhead expenses may include, but are limited to 25%, accounting, advertising, depreciation, indirect labour, insurance, interest, legal fees, rent, repairs, supplies, taxes, telephone, travel and utilities. Overhead costs may not include depreciation costs of large equipment having been completely funded by FNR in other previous programmes. Overhead costs have to be reasonable and based on an auditable calculation in order to guarantee proper audit trail. Overheads must be identifiable and justified by the accounting system of the participant as being incurred in direct relationship with the eligible direct costs attributed to the project. Indicate the method of calculation in relationship with the eligible direct costs (i.e. as a rate calculated with respect to total personnel costs).

Other costs

VAT is not an eligible cost in case the institute can reclaim VAT from the Luxembourg tax authorities in conformity with Luxembourg indirect tax regulation.

Costs for knowledge transfer are eligible.

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The Netherlands (NWO)

NWO Eligibility Requirements for HERA JRP UP applicants based in the Netherlands

Who can apply?

Senior researchers who are employed at Dutch universities or NWO- and KNAW-institutes may participate in a HERA JRP Uses of the Past CRP consortium as Project Leader or as Principal Investigator. Note that the employment can be a tenured appointment or a temporary appointment for the course of the application process and the research project. Article 1.1 of the [General Terms and Conditions of NWO Grants](#) 2011 of NWO Grants states from which Dutch organizations a funding proposal to NWO can be submitted.

Researchers not formally affiliated with a research institute recognised by NWO (e.g. "hogescholen" or museums) may be part of a HERA JRP Uses of the Past CRP consortium but cannot function as formal Project Leader (PL) or Principal Investigator (PI).

What are eligible costs for Dutch researchers?

Applicants from Dutch institutions need to verify that their budgets comply with the NWO eligibility requirements. This can be done by contacting the institution's administration and/or the HERA JRP UP National Contact Point at NWO (in case of doubts). Please prepare the draft budget table well before the submission deadline in order to allow time to check the budget tables and make the necessary changes.

Eligible personnel costs: (maximum project duration 3 years)

- Temporary academic personnel (PhD, postdoc, assistant researcher). The personnel costs will be funded in accordance with the most recent version of the [VSNU contract Agreement for Funding Scientific Research](#) (VSNU contract 1-7-2015: [postdoc](#) 1.0 fte for 3 years € 202.663; [PhD](#) 1.0 fte for 3 years € 158.868). In the case of an assistant researcher the budget requested will be assessed against experience and the type of activities; most often that will mean using the NWO-HBO salary tables in the same VSNU contract.

A benchfee of € 5.000 may be requested for each of the postdocs or PhDs in the project consortium for participating in international conferences and/or summer schools. Please add this amount to the respective personnel costs according to the VSNU contract, and fill in the total amount at 1.

Employment costs (one line per researcher).

- For senior permanent staff a Replacement Grant may be applied for. Replacement grants are based on standard amounts. The maximum amount that may be requested for the entire research project is € 50.000 for an exemption of 0.5 FTE for a duration of 24 months. Lesser exemptions will be calculated proportionally. For example, the maximum that may be requested for an exemption corresponding to 0.5 FTE for a duration of 12 months is € 25.000. The maximum Replacement Grant may be distributed over up to three persons.

Eligible material costs are e.g.:

- Costs for organizing project meetings and workshops (venue, travel and accommodation and subsistence costs);
- Costs for knowledge exchange and valorisation activities;
- Joint publication costs (incl. editing and translation costs);
- Other material costs (contact NWO to check eligibility of proposed material costs).

All budget items must be specified and justified. Please add the justification below the budget table (A) in section C3.1.

In accordance with the NWO-VSNU agreement, the non-staff costs exclude infrastructure costs (accommodation, office automation, books, i.e. costs of facilities which can be regarded as part of the normal infrastructure for the discipline concerned) and overheads. As no overhead costs will be reimbursed, this means that in the official budget form, at overhead "0" must be filled in.

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THE NETHERLANDS

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Norway (RCN)

RCN Eligibility Requirements for HERA JRP UP applicants based in Norway

Who can apply?

Researchers at Norwegian universities, university colleges or other Norwegian research institutions recognised by RCN⁴ may participate in a HERA JRP consortium as Project Leader (PL) or as Principal Investigator (PI).

What are eligible costs for Norwegian researchers?

Eligible personnel costs:

- Payroll expenses for researchers:
 - *Applicants from universities and university colleges:* For budgeting of payroll costs and indirect expenses for researchers the rate for the lump-sum allocation for post-doctoral research fellowships can normally be used, see table below for rates.
 - *Applicants from independent research institutes:* Payroll and indirect expenses are to be calculated together as hourly rates for groups of R&D personnel. The hourly rate is to be established by the individual research institute and must reflect the actual costs based on efficient operations.
- Postdoctoral research fellowship: Lump-sum allocation, see table below for rates
- Doctoral research fellowship: Lump-sum allocation, see table below for rates

Rates/lump-sum allocation for fellowship grants and researcher positions (**in HERA applications all costs must be given in Euros**):

Grants/position	Rate 2016	Rate 2017	Rate 2018	Rate 2019
Doctoral and post-doctoral research fellowships and researcher positions	NOK 1 004 000 per year	NOK 1 039 000 per year	NOK 1 070 000 per year	NOK 1 102 000 per year

The rates for lump sums include compensation for indirect costs and additional overhead will not be granted.

National requirements for personnel costs are described on RCN's website:

http://www.forskningradet.no/Payroll_expenses_and_rates

Eligible material costs/operating expenses:

- Travel & accommodation & meeting costs
- Costs for knowledge transfer
- Joint publication costs (incl. editing and translation costs)
- Operating expenses

The RCN operates a separate funding scheme to support Open Access publications at the research institutions (STIM-OA). Cost for Open Access publications from Norwegian researchers should thus be budgeted as own funding.

⁴ A list of approved research institutions can be found on RCN's website:

http://www.forskningradet.no/en/General_application_requirements/1184159007037

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Poland (NCN)**NCN Eligibility Requirements for applicants based in Poland**

- Only proposals involving **basic research** may be submitted in response to the call for proposals.

Who can apply?

- Polish research institutions as referred to in Art. 10 of the Act of 30 April 2010 on the Principles of Financing Science (Dz. U. z 2010 r. nr 96, poz. 615 z późn. zm.)
<http://www.ncn.gov.pl/sites/default/files/pliki/ustawy/ustawa-o-ncn.pdf>
- The applicant who intends to act as Principal Investigator must be a researcher with a doctoral degree, with an established scientific record.
- Principal Investigator must be employed at a Polish research institution

Please note:

- Under this scheme the NCN will not offer state aid grants:
<http://www.ncn.gov.pl/finansowanie-nauki/pomoc-publiczna?language=pl>;
- Overhead costs must not exceed a maximum of 30% of eligible costs (excl. equipment) and may not be increased during the course of a research project;
- Administrative personnel costs have to be covered from overheads;
- Applicants are obliged to adhere to the rules included in the following documents:
<http://www.ncn.gov.pl/sites/default/files/pliki/katalog%20kosztow.pdf>;

Contact:

NARODOWE CENTRUM NAUKI

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Portugal (FCT)

FCT Eligibility Requirements for applicants based in Portugal

Organisation Name

Fundação para a Ciência e a Tecnologia

Who can apply?

The following entities, having legal authority to enter into contracts, may, either individually or jointly, submit proposals for funding of the projects:

- Higher Education Institutions, their institutes and R&D centres;
- Associate Laboratories;
- State Laboratories;
- Private non-profit institutions whose main objective is to carry out S&T activities;
- Companies;
- Other public and private non-profit institutions which carry out or participate in scientific research activities.

What are the eligible costs for researchers in your country?

The following costs borne by the recipients and incurred exclusively in the execution of the project are considered eligible:

- Human resources;
- Missions;
- Consultants;
- Acquisition of goods and services;
- Registration of patents;
- Adaptation of buildings and facilities;
- Acquisition of scientific and technical instruments;
- Overheads up to a limit of 20% of the eligible direct costs.

VAT should be included in the budget figures provided.

Percentage of costs covered by national funding:

- Large Enterprises, Groups and Associations of Enterprises, Medium Enterprises, Small Enterprises - 50%;
- Research Institutes and Universities - 100%.

Payments made to companies may not exceed 50% of the total cost of the company's participation. During the execution of the project, the recipients should present to FCT the documents related to the total expenses made.

Exception to national regulations

The percentage of time dedicated to transnational projects will not be added to the percentage of time dedicated to existing national projects.

Funding commitment

The contribution of FCT to the HERA 'Uses of the Past' call for proposals will be 350 000 Euros.

Maximum funding per awarded project

- Up to **250 000** Euros if the applicant is the transnational project consortium coordinator;
- Up to **150 000** Euros if the applicant is NOT the transnational project consortium coordinator

Portuguese applicants must follow the Regulations governing access to funding for scientific research and technological development projects — 2010 (with 2011 changes) at:

<http://www.fct.pt/apoios/projectos/regulamento.phtml.en>

Anticipated number of fundable research groups

1 - 2

Eligibility of project duration

Maximum 3 years.

Links to further information or documents:

Information available at <http://www.fct.pt/apoios/projectos/regulamento.phtml.en>

Each Portuguese organisation has to submit a 'Statement of Commitment' (duly signed, dated and stamped by the Principal Investigator as well as by the responsible for the RDT Unit), to the FCT NCP, by e-mail, up to the pre-proposal submission deadline, available at FCT website.

Contacts:

Luisa Igreja

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E-mail: luisa.igreja@fct.pt

International Relations Department

FCT - Fundação para a Ciência e a Tecnologia

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International Relations Department

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Portugal



Slovenia (MIZS)

National Eligibility Requirements for HERA JRP UP applicants based in Slovenia

(MIZS – Ministrstvo za izobraževanje, znanost in šport)

Who can apply?

Researchers (senior, post-doc, PhD) who are registered at Slovenian Research Agency (ARRS).

Slovenian universities or public research institutes may participate in a HERA JRP CRP consortium as Project Leader or as Principal Investigator. Researchers involved in HERA project needs to have enough free research hours on their disposal to conduct research. Slovenian Project Leader (PL) and/or Principal Investigator (PI) are required to have in the time of the final submission of project proposal their bibliographic research indicators **A1+A2+A3≥1** (bibliografski kazalci raziskovalne uspešnosti). Check this through Slovenian SICRIS database: <http://www.sicris.si>.

What are eligible costs for Slovenian researchers?

Personnel costs - Salary (plača)

Salary taxes and social & health security (prispevki delodajalca)

Material costs (materialni stroški, blago in storitve)

Amortisation (amortizacija opreme)

Source: Slovenian Research Agency (ARRS): Funding for research projects (2.2 Raziskovalni projekti): <http://www.arrs.gov.si/si/progproj/cena/cena-15-jan.asp> (category B or in some cases C is applicable for HERA research projects; please contact your NCP for more information).

Overheads are under Slovenian rules defined as running costs for covering the costs of institution. Overheads are therefore calculated as a maximum of 15% of eligible material costs and amortisation (equipment). These costs are used for covering the running costs and other fixed costs of the institution. In full proposal stage, these costs should be specified under the field of *Overheads* in HERA budget template.

VAT is not an eligible cost in case the institute can reclaim VAT from the Slovenian tax authorities in conformity with Slovenian tax regulation.

What kind of documentation do I need to submit before the end of Full proposal stage (2nd stage)?

Before the end of Full Proposal stage all Slovenian PLs or PIs must contact MIZS as the proposed budget for Slovenian participants will be checked by MIZS prior to official online submission at HERA. Slovenian participants are therefore requested to submit their draft HERA financial budget template to MIZS before the official submission of project proposal together with the national financial table where hours for all Slovenian participants need to be specified. National financial template will be provided on MIZS website: (http://www.mizs.gov.si/si/obzorje2020/razpisi/hera_razpis_2015/).

Furthermore, at the Full Proposals stage, each Slovenian PIs must submit a formal commitment letter signed by the proper authority from their institution (rector of the university or director of the research institute) to MIZS. Original signed letter must be sent by post. Template of formal commitment letter will be provided on MIZS website (http://www.mizs.gov.si/si/obzorje2020/razpisi/hera_razpis_2015/).

CONTACT:

dr. Davor Kozmus
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Masarykova 16, 1000 LJUBLJANA, SLOVENIA

tel.: +386 1 478 4693

E-mail address: davor.kozmus@gov.si

Spain (MINECO)

National Eligibility Requirements for HERA JRP UP applicants based in Spain

Who can apply?

Only partners eligible under the Spanish "*Programa Estatal de Investigación, Desarrollo e Innovación Orientada a los Retos de la Sociedad*" of the "*Plan Estatal de Investigación Científica y Técnica y de Innovación 2013-2016*", Acciones de Programación Conjunta Internacional, can apply.

The entities eligible for MINECO funding are:

- Universities and other public research institutions, including public foundations
- Private non-profit research institutions performing RTD activities in Spain
- Technological centres

Private companies **will not** be funded through this call by the MINECO.

The Principal Investigator (PI) must hold a PhD. Other requirements might apply (see detailed information in the Plan Estatal documents below).

- Double funding, overlapping with other National funding, is not allowed.
- Researchers (Principal Investigator and Project members) **are not allowed** to apply for funding in more than one proposal of this call.

What are eligible costs?

- Personnel costs for temporary contracts (fellowships are not eligible)
- Current costs such as those incurred in purchasing small scientific equipment, disposable materials, travelling expenses and other costs that can be properly justified as necessary to carry out the proposed activities
- Indirect costs (overheads) are not eligible for funding.
- Double funding (overlapping with other EU or National funding) is not allowed.

For further information see. Art. 9 Orden ECC/1780/2013 below

Funding rates:

Maximum funding:

- up to 100.000 € per project partner (up to 200.000 € per project for the whole Spanish part in case more than one Spanish partner participates in the same proposal);
- up to 200.000 € per project coordinator (up to 250.000 € per project for the whole Spanish part in case one Spanish eligible institution coordinates the project consortium).
- Two researchers from the same institution and applying within the same international consortium should apply as one partner with one of the researchers being the PI (principal investigator).

Links to further information or documents:

- Orden ECC/1780/2013, de 30 de septiembre, por la que se aprueban las bases reguladoras para la concesión de ayudas públicas del Programa Estatal de Investigación, Desarrollo e Innovación Orientada a los Retos de la Sociedad, en el marco del Plan Estatal de Investigación Científica y

Técnica y de Innovación 2013-2016. («BOE» núm. 236, de 2 de octubre de 2013, páginas 80222 a 80256, http://www.boe.es/diario_boe/txt.php?id=BOE-A-2013-10259)

- Resolución de 17 de junio de 2015, de la Secretaría de Estado de Investigación, Desarrollo e Innovación, por la que se aprueba la convocatoria para el año 2015 del procedimiento de concesión de ayudas correspondientes al Programa Estatal de Investigación, Desarrollo e Innovación Orientada a los Retos de la Sociedad, en el marco del Plan Estatal de Investigación Científica y Técnica y de Innovación 2013-2016 (BOE núm. 149, de 23 de junio de 2015, páginas 52318 a 52367 http://www.boe.es/diario_boe/txt.php?id=BOE-A-2015-6984).

CONTACT:

Dr. Estrella Fernández García

Dr. Teresa Jurado Guerrero

Ministry of Economy and Competitiveness (MINECO)

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Tel. +34 916 037 990



Vetenskapsrådet

Sweden (VR)

VR Eligibility Requirements for HERA JRP UP applicants based in Sweden

Who can apply?

Researchers holding a Ph.D. affiliated to Swedish universities, university colleges or other Swedish research institutions (e.g. museums) recognised by VR⁵, may participate in a HERA JRP consortium as Project Leader (PL) or Principal Investigator (PI). The activity in the project must be at least 20 per cent. Given that the host institution agrees to host and employ the applying researcher if funds are granted, employment is not required at the time of submission of the application.

Doctoral students may participate in a HERA JRP consortium only if their doctoral research is well and clearly integrated in the consortium research programme. Doctoral course training and other curricular activities are not funded.

At the Full Proposal stage a signature on the application as an annex to the main application is required from the applicant but also from the authorized representative of the administrating organisation/institution or equivalent (normally the head of the department or establishment where the research is to be conducted).⁶

What are eligible costs for Swedish researchers?

The total project costs should be specified, including both direct and indirect costs

Eligible personnel costs:

One or more senior researcher(s), PhDs

One or more Post-doc(s)

One or more Ph.D. student(s) (for restrictions on Ph.D. student participation - see above)

Eligible material costs are e.g:

Travel & accommodation & meeting costs

Costs for knowledge transfer

All joint publication costs (incl. editing and translation costs)

Indirect costs:

The research institution hosting the researcher should calculate the indirect costs based on their own models.

CONTACT:

Anders Sundin, Fil.dr/Ph D

Coordinator Humanities and Social Science

Vetenskapsrådet/Swedish Research Council

Västra Järnvägsgatan 3

Box 1035

SE-101 38 Stockholm, SWEDEN

Tfn/Phone: +46 8 546 44 115, anders.sundin@vr.se

⁵ A list of eligible organisations is found at:

<http://www.vr.se/inenglish/researchfunding/applyforgrants/generalconditionsforgrantapplications/approvedadminist ratingorganisations.4.4b1cd22413cb479b80537a9.html>

⁶ A form for the signature annex can be obtained by sending an email to anders.sundin@vr.se

Switzerland (SNSF)

SNSF Eligibility Requirements for HERA JRP UP applicants based in Switzerland

Who can apply?

Proposals may be submitted by natural persons employed for the duration of the planned research at a Swiss university, a Swiss university of applied sciences, a Swiss university of teacher education (PH) or an institution of the ETH Domain.

Applicants must show that they have successfully carried out research for several years and must be capable of running a project under their sole responsibility and managing the project team. Applicants from universities of applied sciences and universities of teacher education who do not hold a doctorate must show that they have the necessary track record.

Applicants must be able to show that they will themselves make a substantial contribution to the planned project, that the necessary infrastructure is at their disposal and that they will not carry out the relevant research based on instructions from third parties.

What types of funding are eligible for Swiss (SNSF) researchers?

The budget of the Swiss part of the Collaborative Research Project must not exceed 300'000 €. The estimated budget must be given in € only.

Eligible costs

- Personnel costs (for scientific and technical project personnel, but not for the Project Leader or the Principle Investigator). Please follow the general guidelines of the SNSF for [salary scales for doctoral candidates and salary ranges](#) and do include social security contributions.
- Equipment (costs of material of enduring value)
- Research funds such as travel expenses and costs for the coordination for large-scale projects (conferences, workshops). The SNSF does not finance the acquisition or maintenance of expendable items that are part of the infrastructure of an institution (e.g. books, PCs, rental costs).
- Dissemination and knowledge exchange costs: Costs of publication in a purely Open Access journal as well as the production costs of scientific book publications that are digital and are made freely accessible (Open Access) no later than 24 months after initial publication. Please read carefully "HERA JRP UP Guidelines for Applicants (Full Proposal)" available from the HERA website (costs for peer-reviewed journal articles and total budget per project for proceedings, collections and monographs).

The [SNSF Funding Regulations](#) and the [General Implementation Regulations for the Funding Regulations](#) are applicable where not stated otherwise. Therefore, Swiss based researchers can not apply for overheads. Please note that consumables (e.g. office supplies) usually are part of the overhead.

Indirect costs are not eligible for funding.

Is an additional/parallel application requested to the funding organisation?

Swiss based researchers must submit their part of the budget of the Collaborative Research Project for a pre-check until Monday, 28 September 2015, 12:00 CET. Please send it to the contact below.

CONTACT:

Mr. Daniel Krämer
Schweizerischer Nationalfonds
Abteilung Geistes- und Sozialwissenschaften
Wildhainweg 3, Postfach 8232, CH-3001 BERN, SWITZERLAND

E-mail address: daniel.kraemer@snf.ch

United Kingdom (AHRC)

AHRC Eligibility Requirements for HERA JRP UP applicants based in UK

Organisational

Collaborative Research Project (CRP) Proposals may only be submitted by Research Organisations who are eligible to apply to the AHRC. These organisations are:

- Higher Education Institutions (HEI) that are directly funded for research by HEFCE, DEL, HEFCW and SFC
- Independent Research Organisations that have received Research Council recognition to apply to the AHRC in responsive mode:

<http://www.ahrc.ac.uk/What-We-Do/Fund-world-class-research/Pages/Independent-research-organisations.aspx>

- Research Council Institutes

Project Leaders (PL) and Principal Investigators (PI)

To be eligible, the Investigator must be actively engaged in postdoctoral research and be of postdoctoral standing. This means that they either have a doctorate or can demonstrate in the application that they have equivalent research experience and/or training.

The Project Leader or Investigator must have a level of skills, knowledge and experience appropriate to the nature of the proposed project, including intellectual leadership of the project (or aspects of the project).

Project Leaders and Investigators from the UK must adhere to contractual requirements of AHRC Principal Investigators, please consult pages 39-41 of the [AHRC Funding guide](#) for further information.

Project Members: project members from the UK side of a project can be;

- Co-investigator (must fulfill same eligibility as PI)
- Research Assistant
- PhD student - please see further guidance below

International Co-Investigators

Due to the structure of the HERA JRP awards, International Co-Investigators are not eligible for this call. International researchers are only eligible from the list of countries participating in the JRP Uses of the Past call, and should be included in the project as PIs or Project Members as per HERA and National guidelines.

Project studentships

Funding may be sought for **one** full-time (three years) PhD project studentship whose work will contribute to the CRP as a whole. The studentship must fall completely within the duration of the CRP. Funding cannot be sought to complete a PhD which has already started or will start prior to the start date of the project.

Each studentship must provide added value to the project, but also allow the student sufficient independence to make their own original contribution to scholarship. The CRP must be a viable project without the contribution of the UK based project student, but the student should benefit from working within the structure of the project as a whole. A brief summary of the project student will be sought during the negotiation of shortlisted projects to ensure appropriate support and complementarity to the CRP. Project students may be removed from a grant if deemed inappropriate.

When recruiting a student for the project please note that there are limits on the funding available depending on the residency and nationality of the applicant and other requirements. Further guidance will be provided to successful projects.

Only one UK PhD studentship can be requested per CRP. If there is more than one UK PI involved in an individual CRP only one UK PhD studentship can be requested.

Subject

The majority of the UK component of the CRP must be within the subject remit of the Arts and Humanities Research Council.

Eligible costs for UK researchers

The UK elements of the project must be costed on the basis of the **full economic costs (FEC) of the research, and 80% of these costs can be claimed.**

Costs for PI/PL time must be included in the same way as for a standard AHRC application.

In order to cost the proposal accurately it is advised that applicants should calculate their budget using the directly allocated, directly incurred and indirect headings as a starting point.

Once applicants are confident in their budget, the amounts need to be entered onto the HERA budget tables. The following must be adhered to:

- Only the 80% values must be entered into the budget tables (for both the total costs and requested costs). This will mean that the 'total' and 'requested from HERA' costs are the same figures. This applies to both the detailed individual PL/PI budget table and the summary budget tables.
- Do not include the additional 20% of the FEC in any of the columns or tables for additional funding. The 'additional funding' columns and table should only be used for noting contributions from non-academic APs, either cash or in-kind.
- Estates and Indirect costs should be combined and entered into overhead line.
- Individual items of equipment that cost more than £10,000 (or equivalent in Euros) cannot be included.
- The budget must be in Euros.
- A PhD Studentship should be costed on a full award basis (3 years of maintenance and fees) at £60,000 for London institutions and £54,000 non-London institutions. Studentship costs must be included at 100%. Please note that not all applicants will be eligible for a full award, where applicants are only eligible for fees only awards, maintenance payments must **not** be provided.

The Total 80% value, including inflation, should be the amount used towards the 1.2 M€ limit for whole CRP.

There is no defined exchange rate for this call and you will not be required to state one in the application. There is also no defined rate for inflation and this must be determined by the research organisation.

Only the HERA budget template (in Euros) may be submitted with the application.

However it is advised that applicants retain details of the budget with the FEC headings and the exchange rate used for audit purposes.

For full guidance on costings see page 32-38 of the [AHRC Research Funding Guide. Please note that the only exception is that Open Access costs are eligible for a UK budget so long as they are in line with the Open Access information in the Uses of the Past call guidance.](#)

An example budget table for a UK PL/PI will be available from early July on the AHRC's website for guidance only:

www.ahrc.ac.uk/Funding-Opportunities/Pages/HERA-Uses-of-the-Past.aspx

Institutional Supporting Statement (Annex 2)

A statement of support from the host institution of each PI must be included (see the Uses of the Past call guidance for completing Annex 2). For a UK PL/PI the host institution must include the following information in their statement in addition to that detailed in the call guidance:

- Confirmation that all UK costs have been calculated according to standard RCUK FEC rules and that all of the figures in the budget tables are the 80% values.
- Confirmation that the host institution undertakes to provide the remaining 20% of the FEC of the UK costs from their own resources.
- Confirmation that if a UK based PhD studentship is requested, it is complementary to the project and the project is viable without the contribution of the UK based PhD student.

CONTACT:

Arts and Humanities Research Council
Polaris House, North Star Avenue, Swindon, SN2 1FL

Jessica Bacon or Lucy Parnall: hera@ahrc.ac.uk