



Fundacja na rzecz Nauki Polskiej

WELCOME PROGRAMME

Competition Documentation

COMPETITION NO. 3/2010

The WELCOME PROGRAMME is implemented as part of
INNOVATIVE ECONOMY OPERATIONAL PROGRAMME 2007–2013
Priority I, Research and development of new technologies
Measure 1.2, Strengthening the human resources potential of science

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I. INTRODUCTION

The information in this document presents the rules for submitting applications and implementing projects under the Welcome Programme. Some of the appendices may be subject to change. Such changes will not affect the competition deadlines or terms, although they may affect the final wording of some of the appendices to the competition documentation. The Foundation will notify applicants of any changes on an ongoing basis.

We also encourage you to review the answers to frequently asked questions, available on the Foundation's website:

http://www.fnp.org.pl/ang/programy/WELCOME_FAQs_engl.html

II. Glossary

The terms used in this documentation are defined as follows:

1. **Applicant** – for the purpose of this documentation, means a research unit, together with the project manager, submitting an application for supplementary funding in the Welcome Programme.
2. **Application** (application for supplementary funding) – in the Welcome Programme, an application comprises an application form filled out online and a printed version of the form signed in accordance with the requirements of the competition documentation, together with all the required appendices described herein.
3. **Innovative Economy Operational Programme (IE OP)** – one of the instruments for implementing the National Strategic Reference Frameworks 2007–2013 (NSRF). The NSRF define the national intervention frameworks within the European Regional Development Fund (ERDF), the European Social Fund (ESF) and the Cohesion Fund, as well as the principles of coordination between the European Union's cohesion policy and the relevant national sector and regional policies. IE OP is aimed at supporting innovation in a broad sense.
4. **Intermediate Body (IB)** – an institution to which the managing body delegates part of its functions related to management, inspection and monitoring of an operational programme with regard to an operational priority, measure or project. In the case of IE OP Priority 1, the intermediate body is the Ministry of Science and Higher Education (MNiSW).
5. **Lasting nature of project results** – under Article 57 of Council Regulation (EC) No. 1083/2006 of 11 July 2006, a project's lasting nature (durability of operations) is maintained if the project does not, within five years of its completion, undergo substantial modification:

- affecting its nature or its implementation conditions or giving an undue advantage to the beneficiary, and
- resulting either from a change in the nature of ownership of an item of infrastructure or the cessation of a productive activity.

The concept of durability is explained in greater detail in the frequently asked questions (FAQ) section.

6. **Managing Body (MB)** – the relevant minister or other public administration body responsible for preparing and overseeing the implementation of an operational programme. In the case of IE OP, the Managing Body is the Ministry of Regional Development (MRR).

7. **Measure** – an assistance instrument implementing an operational priority in an operational programme with separate purpose and principles of implementation; a group of projects with the same objective within an operational programme priority. The Welcome Programme is implemented within IE OP Measure 1.2, ‘Strengthening the human resources potential of science’.

8. **PhD student** – a participant in PhD studies.

9. **Postdoctoral fellow** – a postdoctoral fellows, if less than 4 years will have passed since they obtained their PhD when financing begins. For persons, who have been on maternity leave or a paid leave for a new parent the limitation is prolonged by 2 years. This prolongation holds for women, who during such leaves were not professionally employed.

10. **Priority** – a group of measures whose completion serves to achieve the specific goal set down in the operational programme. The Welcome Programme is carried out as part of IE OP Priority 1, ‘Research and development of new technologies’.

11. **Project** – an undertaking within a measure, the subject of an agreement on supplementary funding for a project concluded among the Welcome Programme recipient, the unit and the Foundation.

12. **Project budget** – a project’s financial plan, divided into reporting periods. It comprises an individual grant part and a project (grant) part.

13. **Project implementation period** – the time during which the project costs are considered to be qualified, the time specified in the agreement needed to achieve the tasks and results stated in the application for supplementary funding.

14. **Project indicators** – indicators defined prior to project implementation for the purpose of monitoring project implementation and evaluating its completion with respect to previously defined goals. A list of project implementation indicators in the Welcome Programme is contained in this documentation (section 5.4.1).

15. **Qualified costs** – costs which are justified for reasons of merit and which meet eligibility criteria specified by the Managing Body. The principles regarding qualified costs, concerning the time when they are incurred, the entity which incurs them, and the categories of expenses related to project

implementation, are described in the appendices to operational programme supplements. The list of qualified costs for the Welcome Programme is contained in this documentation (section 5.3.4).

16. **Recipient** – a foreign researcher, manager of a project (team), whose application for supplementary funding in the Welcome Programme has been approved following the relevant competition procedure.

17. **Reporting period** – the period after which (within 25 days) the recipient is required to submit a report on project implementation. The Welcome Programme has six-month reporting periods, from 1 May through 31 October and from 1 November through 30 April, where the first report covers the period from the project implementation starting date through the end of the current reporting period, and the end of the final reporting period is determined by the project implementation closing date.

18. **Research units** – these are the following types of units conducting research or development in a continuous manner:

- basic organizational units of tertiary educational institutions as defined in the statutes of such institutions,
- scientific units of the Polish Academy of Sciences (PAN),
- research and development units,
- international scientific institutes established on the basis of separate regulations,
- organisational units with the status of research and development units,
- the Polish Academy of Arts and Sciences (PAU),
- certain other organisational units with legal personality and registered main office in Poland.

19. **Student** – a person studying in a second-level university course or in the 4th or 5th year of a uniform master's course.

20. **Young researcher** – a student (as in section 2.18), a PhD student (as in section 2.8) or a postdoctoral fellows (as in section 2.9).

III. Purpose of the Welcome Programme

The objective of the Welcome Programme is to involve eminent foreign researchers in setting up research teams in Poland and to intensify international cooperation by Polish research units. Support may be provided to projects from the fields referred to as *Bio*, *Info*, *Techno* (see appendix) carried out in teams with the participation of students, PhD students, and postdoctoral fellows.

The ideal candidate should:

- have independent research experience, and

- present an innovative and competitive project comparable to the best, most advanced research in the world in its field.

IV. General information

4.1 About the competition

4.1.1 The Welcome Programme is implemented by the Foundation for Polish Science (FNP – the ‘Foundation’) within Measure 1.2, ‘Strengthening the human resources potential of science’, of Innovative Economy Operational Programme 2007–2013.

4.1.2 The application selection procedure in the Welcome Programme does not constitute a competition for purposes of the Act on Rules for Development Policy of 6 December 2006 (*Journal of Laws* 2006 No. 227 item 1658; *Journal of Laws* 2007 No. 140 item 984).

4.2 Funding earmarked for projects

The overall amount assigned to the competition is **PLN 25 million**

4.3 Application deadline

Applications for supplementary funding for projects in the Welcome Programme will be accepted until

15 April 2010

4.4 How to file an application

Applicants must file applications both online and as a hard copy.

4.4.1 Applicants must register in the electronic system the Foundation has made available on the website www.fnp.org.pl. The electronic form must be filled out in English, and the appendices in the language indicated. The electronic system allows changes to be made to the form and appendices to be replaced until final confirmation of the form. Once all the required fields have been filled in and all the required appendices added, the application should be confirmed and printed out, and a hard copy of all the required appendices attached.

4.4.2 The following must be attached to the application form:

- a) in electronic form (*.doc*, *.pdf*, *.xls*, *.jpg* or *.rtf* format) and hard copy:

- 1) description of the research project for all team members – up to 10 A4-size pages (in English);
 - 2) possibilities for economic application of the project results – up to 2 A4-size pages (in English);
 - 3) CV of the foreign researcher – project manager, including research and implementation achievements as well as collaboration with foreign centres (in English);
 - 4) copies (or descriptions) of the five most important publications, implementations, patent applications or patents of the head of the team or laboratory from the previous 4 years (publications in the original language, descriptions in English);
 - 5) the researcher's most important experience with transferring R&D work to the economy – up to 2 A4-size pages (in English);
 - 6) research and implementation achievements of the unit where the project will be carried out (in English);
 - 7) letter of intent from the foreign unit on the scope of cooperation within the project (in English); A letter of intent is required from each declared foreign partner.
 - 8) description of recruitment procedures in the open competition for new team members for the project – up to 2 A4-size pages (in English) – *see section 5.1.8*;
 - 9) project implementation schedule prepared in accordance with the specimen provided with this documentation and also available for download at the Foundation's website (in English);
 - 10) certificate of employment or promise of employment of the researcher at the research unit;
- b) hard copy only:
- 1) statement of the unit's VAT qualification (in Polish),
 - 2) power of attorney to sign the application (if applicable).

4.4.3 The applicant must submit one hard copy of the registered application form with the required appendices (**copies need to be certified as conforming to the original in accordance with the rules in force at the given unit**) and the required signatures. The hard copy of the application form and the appendices must be *identical* to the electronic version. **The application must be signed by the project manager – foreign researcher and the person authorised to represent the research unit where the project will be carried out, in accordance with the rules of representation in force at the unit** (depending on the unit: rector, PAN director, R&D unit director, or their proxies). If the application is signed by a proxy, the power of attorney must be attached.

The appendices form an integral part of the application.

4.4.4 Applications may be sent by post or courier or delivered in person to the following address:

Fundacja na rzecz Nauki Polskiej
ul. Grażyny 11

02-548 Warsaw

with a note on the envelope: “**Program Welcome**”

4.4.5 The date of submission is determined by **the date of receipt of the hard copy**, not the postmark date; provided, however, that on the last day for submissions, applications will be accepted only until 4 p.m.

V. Competition requirements

5.1 Entities eligible to apply for supplementary funding

5.1.1 The application is submitted by the research unit together with the foreign researcher – project manager.

5.1.2 A foreign researcher is defined as:

- a) a Polish researcher with at least a PhD who has been abroad for at least 2 years, and plans to return to Poland or returned no earlier than 2 years (24 months) prior to the application deadline, or
- b) a foreign researcher with at least a PhD who plans to come to Poland or has headed a research team in Poland for no more than 5 years (60 months) prior to the application deadline.

5.1.3 To be eligible to apply for supplementary funding, the unit must:

- a) agree to respect the research autonomy of the project manager in accordance with the approved research project specified in the application;
- b) ensure the necessary conditions for conducting scientific research in accordance with the scope presented in the application, and access to research apparatus;
- c) release the project manager from administrative and teaching duties at the unit exceeding 60 hours of teaching per year;
- d) agree to provide the Foundation, within 6 months of signing the agreement on supplementary funding for the project, with the code of research ethics and good professional practice in force at the unit (units which do not have such a code of ethics agree to draw up and approve the code and submit it to the Foundation by such deadline; a specimen of such code of ethics is available from the Foundation upon request);
- e) **for the duration of the project, agree to ensure full-time employment to postdoctoral fellows selected in an open competition, but their salary will not be subject to reimbursement from project funds.**

5.1.4 During implementation of the project the foreign researcher will be employed full-time at the host unit, which will finance his or her salary, which will not be subject to reimbursement from project funds. In addition to salary, the researcher will receive a personal research grant financed from project funds. The grant is designed to make up for the disproportion between the salary received at the foreign unit where the researcher previously worked and the salary at the Polish unit, and to reflect the position previously held by the researcher.

PLEASE NOTE: The fact that the recipient receives a personal research grant shall not constitute grounds for any change in the rules for the unit's payment of salary to the recipient which would be to the recipient's disadvantage.

5.1.5 Throughout the project's duration the foreign researcher is required to work at the host unit at the project implementation location for no less than 10 months per year.

5.1.6 As part of the project, the project manager is required to conduct an open recruitment of team members receiving a grant from the funds earmarked for the project. Those eligible to take part in the competition are:

- a) students (see section 2.14),
- b) PhD students (see section 2.18),
- c) postdoctoral fellows (see section 2.9).

5.1.7 Following recruitments, the total number of students, PhD students and postdoctoral fellows on the team must be no fewer than **6 persons starting no later than at the beginning of the 7th month from the start of the project until the end of the project** (except for up to 2 monthly periods which may be necessary to conduct another recruitment). The recruitments at the beginning of the project must be completed within 6 months from the project starting date. The recipient is required to provide the Foundation with data on the team members selected within 7 days following the conclusion of the recruitment procedure.

By the seventh month following the project starting date at the latest, there must be at least 6 young researchers working on the project.

5.1.8 The following rules apply during recruitment:

- a) Information about the competition must be published nationwide in Poland and abroad, including a nationwide medium targeted to potential candidates for the team (daily newspaper or periodical) as well as on free websites, e.g.:

<http://www.eurosciencejobs.com>

<http://ec.europa.eu/eracareers>

<http://www.eracareers-poland.gov.pl>

- b) The project manager is required to appoint a committee of at least three members, responsible for conducting the recruitment. If there is a conflict of interest between a member of the recruitment committee and a candidate, the expert on the committee shall abstain from voting on the candidate.
- c) The team manager may propose various media in which an announcement will be placed, depending on the team position offered (student, PhD student or postdoctoral fellow). The team manager is required to post information on the ideal candidate profile on the website of the unit where the project is being implemented or the website of the Welcome team. The competition announcement must contain at least a reference to such information.
- d) The committee is required to prepare and conduct the recruitment in accordance with the procedures for selecting team members proposed in the application. The committee may specify the criteria for admitting candidates to participate in the recruitment, in particular conducting an exam, specifying the fields which the candidates may represent, requiring a positive recommendation from their current scientific supervisor, and so on. The recruitment should be conducted on the basis of measurable selection criteria, such as:
- the candidate's scientific achievements;
 - in the case of students, their average overall mark;
in the case of PhD students, the final credit for their master's course (including average mark for the entire course, mark for defence of the master's thesis and mark for the thesis itself);
in the case of postdoctoral fellows, the final credit for their doctoral course (including average mark for the entire course, mark for the doctoral exam and distinction in defence of the doctoral dissertation);
 - research experience;
 - foreign traineeships;
 - participation in conferences.

PLEASE NOTE: The recruitment procedure is subject to careful evaluation by reviewers at the first and second stage of the merit assessment. We recommend presenting a detailed description of the recruitment procedures for specific positions on the team (student, PhD student, postdoctoral fellow).

- e) An interview conducted in English constitutes one of the stages in the team member recruitment procedure.
- f) The interview may be in the form of a teleconference, where all the committee members must be capable of participating in the interview.

- g) The committee is required to document the recruitment procedure in the form of a report.
- h) The report must contain, at the least, information on announcements of the competition, selection criteria, candidates' personal data, the names of their home units, marks received in the recruitment procedure, and the recruitment dates. (The report will be subject to inspection.) The report must be signed by all members of the recruitment committee. Within seven days after completion of the recruitment, the team leader shall submit information on the recruitment, including the report, to the Foundation, along with a list of the team members selected. Approval of the report is a condition for the Foundation to enter into research grant agreements with the team members.
- i) The unit will provide the Foundation's representative and/or outside expert designated by the Foundation an opportunity to take part in the recruitment committee's work as an observer.
- j) The recruitment must involve at least two candidates (meeting the competition terms) for each place (grant).

PLEASE NOTE: If the required number of candidates do not apply, the project will be subject to financial and substantive modification or termination.

5.1.9 Only students, PhD students and postdoctoral fellows selected via the open recruitment procedure are eligible to receive grants in the project, but they may not also receive salary from project funds.

5.1.10 The team may also include other scientific workers (not selected in an open recruitment procedure). The planned number of scientific workers involved in the project should reflect the need to provide scientific supervision for young researchers conducting research as part of the team, among other considerations.

5.1.11 Entities excluded from applying for supplementary funding under Article 211 of the Act on Public Finance of 30 June 2005, i.e. entities which in the previous 3 years used public funds contrary to their rightful purpose, violating applicable procedures or receiving funds that were not due or in excessive amounts, shall not be eligible to apply for the programme.

5.2 Project duration

5.2.1 The applicant for supplementary funding shall set the project starting date (no later than 1 January 2011) and completion date (no later than 30 June 2015), taking into account that the project implementation period is the same period during which expenses that are incurred may be recognised as qualified costs.

5.2.2 Projects may not last less than 3 years and they have to end by the 30 June 2015.

5.2.3 The participation of students and PhD students in research projects shall be considered completed no later than the end of the month in which the defence of the student's master's thesis (for students) or doctoral dissertation (for PhD students) takes place, provided however that the participation of individual PhD students in the project may not last longer than 4 years.

5.3 Financial terms

5.3.1 A project is funded up to 100% of qualified costs. Any revenue generated in the project reduces the value of its qualified costs.

5.3.2 An expense that qualifies for funding is one that meets all of the following conditions:

- a) it was actually incurred during the project implementation period;
- b) it complies with applicable EU regulations and national laws;
- c) it complies with the provisions of the Innovative Economy Operational Programme and the list of qualified expenses for IE OP Measure 1.2;
- d) it complies with the categories of expenses from the approved project budget;
- e) it is essential for project completion and was incurred in connection with project implementation;
- f) it was incurred economically, i.e. based on the principle of achieving the desired effects at the least possible expense;
- g) it is properly documented;
- h) it has not been excluded by the IE OP Managing Body (see National Guidelines on Qualifying Expenses from Structural Funds and the Cohesion Fund in the Programme Period 2007–2013).

5.3.3 Rules for documenting qualified expenses:

- a) An actually incurred expense must be supported by an invoice or accounting document of equivalent evidentiary value or other proof of payment and a bank statement.
- b) A document of equivalent evidentiary value is any document presented by the beneficiary to prove that the accounting entry provides a fair and accurate depiction of transactions actually conducted, in accordance with the Accounting Act (*Journal of Laws* 2002 No. 76 item 694 as amended).
- c) Copies of documents attached to an application for payment, evidencing expenses incurred, shall be certified to be a true copy and described so that the relation to the project is clear, and should be linked to a specific item in the cost estimate.

5.3.4 List of qualified costs in the Welcome Programme:

- a) grants for a student, PhD student, postdoctoral fellow or foreign researcher (in the case of PhD students, also including Social Insurance Institution (ZUS) pension insurance);

- b) salary and non-salary employment costs for persons involved in project implementation, including mandatory social and health insurance;
- c) depreciation of fixed assets (see section 5.3.7), intangibles and developed real estate used in project implementation, in compliance with the general rules for depreciation of the given fixed assets, intangibles and developed real estate, in the scope and for the duration of their use in project implementation;
- d) spending on laboratory equipment, not exceeding 20% of the project's total qualified costs (i.e. 20% of the sum of funds from the grant and project portions);
- e) spending on materials, software, and software licences;
- f) spending on research services as well as technical and financial expert opinions necessary for proper project implementation;
- g) spending on publications, database access and other paid information sources necessary for project implementation, not exceeding 5% of the project's total qualified costs (i.e. 5% of the sum of funds from the grant and project portions);
- h) spending on patent protection and consulting on intellectual property protection, including fees for the initial patent application directly resulting from the project;
- i) spending on promoting the project, including promotion of the project's results;
- j) spending on publishing the research results in open access periodicals;
- k) spending related to recruitment of research team members, not exceeding 3% of the project's total qualified costs (i.e. 3% of the sum of funds from the grant and project portions);
- l) overhead not exceeding 10% of the project's total qualified costs (i.e. 10% of the sum of funds from the grant and project portions). This does not mean indirect costs provided to the unit. Overhead must be devoted exclusively to the purposes of project implementation.;
- m) VAT which the Unit cannot recover under applicable national regulations (NOTE: VAT is a qualified cost only if the Unit has no legal means of recovering VAT under the VAT Act of 11 March 2004, Journal of Laws 2004 No. 54 item 535, as amended);
- n) spending on international exchange within the project as well as domestic travel necessary for carrying out the project.

According to the guidelines for the Innovative Economy Operational Programme, only expenses incurred under the project in Poland qualify for supplementary funding. Because the project implementation in some respects crosses the national border due to international cooperation between research units, it is permissible to pay for invoices issued by foreign units within the cost category "spending on research services as well as technical and financial expert opinions necessary for proper project implementation," and to incur expenses for international exchange within the project.

Detailed information on such issues as the rules for qualifying costs under IE OP and calculating the project budget is provided in the **Guidelines on Qualified Expenses under the Innovative Economy Operational Programme 2007–2013**, available at the Ministry of Regional Development website.

<http://www.poig.gov.pl/Dokumenty/wso/Strony/wytyczne.aspx>

5.3.5 Project budget:

The applicant agrees to accept the specified grant amounts and not to exceed the values and percentage thresholds specified for individual cost categories. A PhD student selected for the team who is not covered by pension insurance on another basis is required to elect voluntary pension insurance coverage.

The overall project budget comprises:

a) grant portion, in the following amounts:

i Grant for the project manager – foreign researcher:

PLN 200,000 – 350,000 per year

ii Grant for a student:

PLN 1,000 per month

iii Grant for a PhD student:

- in the case of PhD students who elect voluntary pension insurance coverage under Article 7 of the Social Insurance System Act: **PLN 3,500 per month**

The basis for calculating the premium is at least PLN 1,800. A PhD student is required to submit an application for coverage, on a ZUS ZUA form, to the relevant Social Insurance Institution (ZUS) unit, and to pay the insurance premiums for each month for which they receive a grant, and to submit ZUS DRA declarations,

- in the case of PhD students who are covered by pension insurance on another basis:

PLN 3,000 per month

iv Grant for a postdoctoral fellow:

PLN 5,000 per month

b) project portion, comprising:

i. a grant not exceeding

PLN 1,000,000 per year,

- ii. including project overhead (such as rent, administration costs, project management costs, electricity and heating bills) not exceeding 10% of the project's total qualified costs (i.e. 10% of the sum of funds from the grant and project portions).

PLEASE NOTE: Research grants are paid during the period in which the grant holder has the status specified in the research grant agreement, with the stipulation that the grant may be paid up to the end of the month in which the defence of the grant holder's master's thesis (for students) or doctoral dissertation (for PhD students) takes place.

During project implementation the composition of the team must be the same as specified in the agreement on supplementary funding for the project. If a young researcher on the team loses the right

to receive a research grant, the project manager is required to select a new young researcher with the same status. The additional open recruitment procedure must to be completed within 2 months from the date the young researcher loses such right. The Foundation is entitled to reduce the amount of funding if the project manager fails to meet this requirement.

5.3.6 No double financing

Double financing means impermissible full or partial reimbursement of a given expense twice from public funds – whether EU or national funds. In particular, the following constitute double financing:

- a) reimbursement of the same expense under two different projects co-financed from structural funds or the Cohesion Fund;
- b) reimbursement of VAT costs from structural funds or the Cohesion Fund, followed by recovery of the VAT from the state budget pursuant to the VAT Act of 11 March 2004 (Journal of Laws No. 54 item 535, as amended);
- c) purchase of a fixed asset using funds from a domestic subsidy, followed by reimbursement for the cost of depreciation of the same fixed asset from structural funds or the Cohesion Fund;
- d) reimbursement from structural funds or the Cohesion Fund of an expense earlier financed using a preferential loan from public funds, if the reimbursed portion of the loan is not promptly repaid.

5.3.7 Costs of depreciation of assets, whether fixed assets or intangibles, qualify for co-financing if all of the following conditions are met:

- a) the depreciation deductions apply to assets which are essential for proper project implementation and are used directly for implementation;
- b) the qualified value of depreciation deductions applies exclusively to the period of implementation of the given project;
- c) the value of depreciation deductions has been calculated in compliance with the Accounting Act of 29 September 1994 (Journal of Laws 2002 No. 76 item 694, as amended);
- d) in the case of fixed assets, the expenses incurred to purchase them have not been submitted as qualified expenses, nor has the purchase of a fixed asset been co-financed from national or EU public funds during the 7 years preceding the date of purchase of the fixed asset for the needs of the project (this applies to a situation where the beneficiary buys a fixed asset for the needs of the project but does not want to or cannot be reimbursed for the purchase costs).

PLEASE NOTE: If assets are also used for purposes other than project implementation, only the part of the depreciation deduction is qualified which corresponds to the proportion in which the assets are used for the purpose of project implementation. In such case the residual value (liquidation book value) of the assets after project completion is not a qualified expense.

5.4 Project implementation indicators

5.4.1 The applicant is requested in the application form to provide the planned project indicators, that is, projected products and results. Project implementation indicators selected from the following list are subject to evaluation in the Welcome Programme:

- a) the number of students involved in the project,
- b) the number of PhD students involved in the project,
- c) the number of postdoctoral fellows involved in the project,
- d) the number of foreign scientists involved in the project,
- e) the number of doctoral and habilitation degrees obtained as a result of project implementation,
- f) the number of researchers involved in the project,
- g) the number of publications (including the ISI Master Journal List and open access) resulting from the project.

5.4.2 The indicators presented must be suited to the given type of project and reflect the project's objectives. They will constitute one of the evaluation criteria. If during project implementation the applicant fails to achieve the declared values of indicators, appropriate financial measures may be taken against the applicant.

VI. Project selection system

Projects submitted for the competition are subject to formal and merit evaluation.

6.1 Formal evaluation of application

The formal evaluation criteria, consistent with the formal evaluation criteria specified in the *Detailed Description of IE OP Priorities*, cover three categories:

6.1.1 Formal requirements – application:

- a) submission of the application to the Foundation for Polish Science (FNP),
- b) submission of the application within Measure 1.2,
- c) submission of the application by the deadline,
- d) attachment of all documents required at the application submission stage,
- e) the application and appendices have been prepared in accordance with the instructions for filling out the application for supplementary funding.

6.1.2 Formal requirements – applicant:

- a) the applicant's eligibility for the measure,

- b) the applicant conducts operations and has its registered head office (or residence, in the case of a private individual) in Poland,
- c) the applicant is not excluded from applying for supplementary funding under Article 211 of the Act on Public Finance of 30 June 2005 (Journal of Laws No. 249 item 2104, as amended).

6.1.3 Formal requirements – the project:

- a) the project will be carried out in Poland,
- b) implementation of the project fits within the timeframe for the IE OP measure,
- c) spending planned for the project constitutes qualified expenses under the measure,
- d) the requested amount of support complies with the rules for financing projects under the measure,
- e) the project is consistent with the horizontal policies specified in Articles 16 and 17 of Council Regulation (EC) No. 1083/2006 (according to the applicant's declaration).

6.1.4 If an application is complete and obtains a positive formal evaluation, it will be passed on for merit evaluation, and the applicant will be informed via e-mail. Applicants whose applications do not meet the formal criteria will receive notification (by e-mail or fax) of:

- a) rejection of the application on formal grounds, or
- b) the possibility of submitting, within 7 days of receiving notification, supplementary information specified in 6.1.5; such supplementary information must be provided in writing.

6.1.5 During the formal evaluation, only the following may be supplemented or corrected:

- a) appendices required exclusively in paper form,
- b) missing certifications of copies,
- c) damaged appendices in electronic form.

6.1.6 A corrected application, submitted by the deadline (determined by the date when the application reaches the Foundation, not the postmark date), is subject to a new formal evaluation. The Foundation will evaluate the corrected application in its formal aspects, taking into account the rules set forth in 6.1.4 and 6.1.5, and inform the applicant in writing (by e-mail or fax).

6.2 Merit evaluation of application

The merit evaluation of an application comprises two stages: the written review stage and the interview stage. The first part of the merit evaluation is carried out by reviewers, and the second by an interdisciplinary panel of experts.

6.2.1 Stage I

Under the Welcome Programme, the following are subject to merit evaluation (point values are given in brackets):

- a) compatibility with IE OP objectives and the description of the measure in the *Detailed Description of IE OP Priorities* (5),
- b) scientific value of the proposed project (25),
- c) research and implementation achievements of the project manager, including research independence and experience in transferring R&D work to the economy (15),
- d) scientific standard of the project manager's five most important publications or patents within the past four years (15),
- e) research and implementation achievements of the host unit (10),
- f) procedures for selecting young researchers to work on the team (10),
- g) the scope of the team's international cooperation on the project, based on the letter of intent from the foreign unit (10),
- h) justification and efficiency of the project budget (10).

Each application is reviewed by at least three external reviewers. The experts will:

- a) evaluate the application on a point scale on special forms (available on the Foundation's website) with respect to each of the above criteria, and add a brief comment on each mark (maximum number of points: 100);
- b) make a recommendation (with brief justification) on a scale of 1 to 5 points:
 - an outstanding application which definitely should receive funding – 5,
 - a very good application which should receive funding – 4,
 - a good application which may receive funding if there are sufficient funds – 3,
 - a mediocre application which probably should not receive funding – 2,
 - a poor application which should not receive funding – 1.

A reviewer has the right to propose that a smaller amount of funding than requested be assigned, taking into account the feasibility of the project and maintenance of the necessary quality standards. Proposals to reduce specific costs need to be justified in the evaluation form.

6.2.2 Stage II

Applicants who receive an average recommendation of no less than 3 (good) and whose average mark is at least 75 points will be invited to take part in the second stage. If too many applications qualify for Stage II compared to the limited amount of funding available in the competition (i.e. if the value of the combined budgets of projects that qualify for Stage II is more than twice the amount of funding available in the competition), the Foundation's Management Board may increase the number of points required to qualify.

Candidates who are admitted to Stage II will be notified by telephone and e-mail. Candidates invited to Stage II will receive the reviews of their applications from Stage I, but the evaluating reviewers will remain anonymous. Candidates who fail to qualify for Stage II will be notified in writing (by e-mail or fax).

In exceptional cases, it is possible to hold the interview by telephone in the presence of the panel. Each such case is considered individually.

The interview will serve to discuss the application and clear up any doubts in connection with the written reviews. The panel members will establish a final ranking of applications, comparing candidates from various fields and taking the following into consideration:

- a) the reviewers' evaluations (clarification of any divergent evaluations);
- b) evaluation of whether the applicant can assure that the project provides lasting results, for at least 5 years following project completion (0/1);
- c) evaluation of the project indicators, including whether they suit the given type of project and whether their values reflect the project objectives (0/1);
- d) doubts related to the project budget (clarification of any unjustified or unqualified costs).

6.2.3 A candidate who has been offered a smaller amount of funding than requested because costs are found to be ineligible or unjustified, or due to changes proposed in the merit evaluation, has the right to negotiate with the panel of experts if the applicant has important arguments justifying the adopted budget plan.

6.2.4 On the basis of the ranking prepared by the panel and funds available in a given competition, the Management Board will make a decision in the form of a resolution on assigning funds for project implementation.

Before reaching a decision on assigning funding, the Foundation's representatives may visit the unit where the project is to be carried out, in order to make sure the project meets the conditions of the programme. External experts may be invited to take part in the meeting at the unit. The Foundation may require that the candidate conduct a public presentation of the project at the unit, with the participation of prospective collaborators and future team members.

6.2.5 The list of recipients will be published on the Foundation's website.

6.2.6 Upon receiving a request in writing, the Foundation will provide applicants taking part in a given competition with copies of the reviews of their applications, maintaining the anonymity of the persons conducting the merit evaluation of the application. Any applications not approved for financing may be submitted in subsequent competitions if they meet the requirements thereof.

6.2.7 The Foundation will not return documents submitted (except for original letters of intent).

6.3 Appeal procedure

6.3.1 An applicant (the research unit together with the foreign researcher) has the right to submit an appeal in writing to the Management Board of the Foundation against decisions concerning their application, within 7 days of the receipt of notice of rejection of the application. The date is determined by the date when the appeal reaches the Foundation, not the postmark date; however, an appeal may be sent to the Foundation via fax or e-mail. An appeal will be reviewed within 14 days of the date of receipt by the Foundation.

6.3.2 Appeals related to the formal evaluation will be reviewed by a committee comprising the Programme Director, the Foundation's lawyer or legal adviser, and a Foundation employee not involved in the work of the team handling the selection procedure.

6.3.3 Appeals related to the merit evaluation will be reviewed by a committee of two external experts who collaborate regularly with the Foundation but are not involved in the given competition, and the Programme Director.

6.3.4 The appeal committee deals exclusively with review of procedural issues at each stage of the application evaluation and selection process. The final opinion is adopted by vote. After reviewing the minutes from the committee's session, the Management Board of the Foundation will decide whether to reject or accept the appeal. The applicant will be notified of the decision in writing. The Management Board's decision is final.

VII. Agreement on supplementary funding for a project

The basis for the applicant's obligation to implement the project is the agreement on supplementary funding for the project. The application approved by the Foundation is annexed as an appendix to the agreement.

Before concluding an agreement on supplementary funding for a project, the Foundation reserves the right to hold negotiations with any of the entities applying for supplementary funding for the project, in order to make any necessary changes in the project. In particular, the negotiations may concern the project implementation costs proposed by the applicant and the rules for recruitment of team members.

7.1 Signing of agreement

7.1.1 The agreement on supplementary funding for the project is concluded among the Foundation, the recipient's unit, and the recipient. Recipients will receive the agreement by e-mail and post four identical signed copies of the agreement to the Foundation, together with all the required documents (appendices), by the deadline set by the Foundation but no later than 30 days from the date of receipt. The Foundation will return two signed copies of the agreement to the unit's address, one copy each for the recipient and the unit.

Required appendices to the agreement:

- project budget;
- project schedule;
- statement of the unit's VAT qualification;
- statement on not receiving assistance from national or EU public funding with regard to qualified costs covered by the agreement on supplementary funding for the project;
- power of attorney (required if the application is signed by a person or persons without legal authority to represent the applicant);
- in the case of projects necessitating research involving animals, the consent of the relevant ethics commission, as required by regulations on animal experiments;
- in the case of projects involving studies of protected species of plants, animals and fungi or studies in protected areas, consent or a permit as required by environmental protection regulations;
- in the case of projects involving research on genetically modified organisms or the use of such organisms, consent as required by regulations on genetically modified organisms;
- in the case of projects involving clinical trials, consent or a permit as required by the applicable regulations.

The recipient is required to notify the Foundation of the selection of young researchers for the team, by the deadlines and according to the rules set forth in the agreement, so that the Foundation may prepare the necessary agreements on research grants for them.

7.1.2 Apart from the appendices specified in section 7.1.1, before signing the agreement the Foundation may require that the following documents be presented:

- the unit's statistical number (REGON) certificate,
- the unit's tax identification (NIP) certificate.

7.1.3 Failure to submit all of the required appendices by the deadlines provided may be regarded as withdrawal from seeking supplementary funding. The appendices shall be deemed submitted on the date they reach the Foundation.

7.1.4 If discrepancies are found between the appendices and the information contained in the application, no agreement will be signed with the applicant.

7.1.5 Upon the parties' consent, the signing of the agreement may take place at the Foundation's headquarters, at a time specified by the Foundation.

VIII. Contact

Additional information on the programme is available from:

Team for Programmes Financed from Structural Funds

tel.: +48 22 424 02 52

+48 22 424 02 25

+48 22 424 25 79

+48 22 424 02 26

fax: +48 22 845 95 05

e-mail: fundusze@fnp.org.pl

IX. Appendices to the competition documentation

Appendix 9.1 Specimen agreement on supplementary funding for a project in the Welcome Programme

Appendix 9.2 Specimen agreement on a research grant in the Welcome Programme

Appendix 9.3 Project implementation schedule

Appendix 9.4 Statement of VAT qualification

Appendix 9.5 Statement that the applicant is not receiving assistance from national or EU public funds with regard to the same qualified expenses associated with the given project

Appendix 9.6 Specimen recipient's report on project implementation (scientific and financial portions)

Appendix 9.7 Specimen team member's report on project implementation

Appendix 9.8 Description of the *Bio, Info, Techno* subject areas**Appendix 9.9** Specimen of logosEnclosure 8.1 **Sample agreement on funding for a project in the Welcome Programme**

SPECIMEN
**AGREEMENT ON FUNDING
A PROJECT AND THE RECIPIENT'S PERSONAL RESEARCH STIPEND
WELCOME PROGRAMME**

Agreement No.:

Date of signing by the Foundation for Polish Science:

Agreement on funding a project carried out as part of the Innovative Economy Operating Programme, hereafter referred to as “**IE OP**”, Priority 1. Research and development of new technologies, Measure 1.2. Strengthening the human potential of science, Welcome Programme, hereafter referred to as “the **Agreement**”, concluded between:

The Foundation for Polish Science, with its headquarters in Warsaw 02-548, ul. Grażyny 11, entered in the National Court Register maintained by the district court for Warsaw, XIII Economic Department, under number 0000109744, represented by Prof. Maciej Żylicz PhD hab., hereafter referred to as “the **Foundation**”,

and

1. Mr./Ms.

born (date) in,

resident at:,

holding the following ID (type, No.)

hereafter referred to as “the **Recipient**”

and

2. (Name of unit) with headquarters at (address), tax ID number NIP, statistical number REGON, hereafter referred to as “the **Unit**”, represented by (first name and surname, job position) on the basis of power of attorney No.

hereafter referred to as “the Parties”, as follows:

§ 1 General provisions

1. On the terms set down in the Agreement, the Foundation awards the Recipient funding in a total amount not exceeding PLN (in words:) to carry out the Project (project title:), hereafter referred to as “the Project”, as specified in application No. for funding from the Welcome Programme, attached to the Agreement and hereafter referred to as “the Application”.
2. The Project's total eligible costs do not exceed PLN The Recipient will receive funding on the terms specified in the Agreement.
3. The Recipient and the Unit agree to carry out the Project in accordance with the Agreement, and in particular in accordance with the Application and national and Community law. If changes are made to the Application on the basis of § 9, the Recipient and the Unit agree to carry out the Project in accordance with the current Application and the competition documentation - competition
4. The Unit agrees to respect the Recipient's research autonomy in accordance with the approved research plan which is the subject of the Application, ensure the proper conditions for conducting research in accordance with the scope presented in the Application, and provide access to research apparatus. The Unit hereby

- releases the Recipient from administrative duties in the Unit and from teaching duties other than those specified in section 6.
5. Throughout the implementation of the Project the Unit agrees to employ the Recipient full-time and to finance his/her remuneration stemming from the employment contract.
 6. The Recipient agrees to work full-time at the host unit for no less than 10 months per year, and to didactic work for no extra fee in an amount not exceeding 60 hours per year.
 7. The Unit agrees to apply its duly drawn up and approved code of ethics, and to send it to the Foundation's address within 6 months of the signing of the Agreement.
 8. The Recipient and the Unit agree to inform the Foundation immediately of a change in the bank account specified in § 3 section 5 and section 6 or in the personal and address data provided in the present agreement. A written statement on the change from the Recipient and the Unit does not necessitate an amendment to the Agreement, nor does an annexe have to be signed. If the above obligation is not fulfilled, the Foundation has the right to reduce the amount of funding specified in § 1 section 1 and/or to shorten the implementation time of the Project as specified in § 2 section 1.
 9. Any costs of securing the return of funding in the project part and any documented costs of debt collection proceedings will be borne by the Unit. Any costs of securing the return of funding in the foreign researcher's grant part and any documented costs of debt collection proceedings will be borne by the Recipient.
 10. The Foundation lays no claim to the effects of the research conducted during the Project on account of having provided funding for the Project's implementation.
 11. The Foundation will not be held responsible towards any third parties for any damages related to the Project's implementation.

§ 2 Project duration

1. The Recipient and the Unit agree to implement the Project in the period from to
2. The Project's implementation includes completing the entire scope of work as specified in the Application and documenting all costs incurred.

§ 3 Project financing

1. The Recipient will receive funds for the Project's implementation in ... (number) equal six-monthly instalments. The value of a single instalment is PLN The first instalment will be transferred within 14 days from the date the Foundation receives a correctly filled-in and signed Agreement. Successive instalments will be transferred immediately after the Foundation approves the periodical reports, conditional upon the availability of funds for carrying out the programme in the Foundation's bank account.
2. The Recipient may apply for joint payment of two successive instalments in one calendar year.
3. Funds not utilized in a given period remain at the Recipient's disposal for subsequent periods.
4. The division of funds for carrying out the Project is set down in the Project's budget (hereafter referred to as the Project budget) which forms an enclosure to the Application. The funds for carrying out the Project include:
 - 1) funds for the project itself,
 - 2) research stipend for the recipient,
 - 3) research stipends for young researchers taking part in the Project and selected in an open recruitment procedure:
 - a) (number) graduate students who have completed their third year,
 - b) (number) PhD students,
 - c) (number) postdoctoral fellows.
5. Funds for the project itself will be transferred in instalments to the Unit's bank account:
6. The research stipend for the recipient, will be transferred in instalments to the bank account specified by the Recipient:
7. The rules for receipt and payment of research stipends for young researchers are the subject of separate agreements concluded upon the Recipient's motion between the Foundation, the Recipient and the young researcher.
8. The Recipient is obligated to select the young researchers specified in § 3 section 4 item 3 in an open competition, within 2 months of the project's starting date as specified in § 2 section 1. The Recipient will

provide the Foundation with the data of the above-mentioned young researchers within 7 days of the recruitment procedure's closing date.

9. During the project's implementation the composition of the team should be that specified in § 3 section 4 item 3. In a situation when a young researcher who is a member of the team loses his/her right to receive the stipend specified in the agreement, as set down in section 7, the Recipient is obligated to select another young researcher with the same status. The subsequent open competition has to close within 2 months of the loss of the above-mentioned right by the young researcher. The Foundation has the right to reduce the amount of funding specified in § 1 section 1 if the Recipient fails to fulfil the said obligation.
10. During the Project's implementation the Unit agrees to ensure full-time employment for postdoctoral fellows, where their remuneration stemming from their employment contract is not subject to reimbursement from project funds.
11. The Recipient, as the Project leader, is the holder of awarded funding. The Unit may spend funds provided by the Foundation for the project only with the Recipient's consent.
12. The person authorized by the Unit may refuse to accept the Recipient's instructions on spending funds from the project part, if it is incompatible with the law or the provisions of the Agreement.
13. Bank interest on the project part of the funding transferred to the Recipient and remaining in the Unit's bank account reduces the amount of awarded funding and should be reported in the books and accounted for.
14. The Unit agrees to maintain separate bookkeeping records related to the Project's implementation, in accordance with the principle of transparency stemming from the law on bookkeeping (Dz.U./Journal of Laws 2002, No. 76, item 694, as amended), in a way enabling identification of individual bookkeeping operations.
15. The Unit will not collect any indirect costs for handling the funding for the Project; the general costs included in the Project budget are eligible costs.
16. If the Recipient or the Unit incur eligible costs in an amount greater than specified in § 1 section 1, this will not constitute grounds for increasing the awarded amount of funding.

§ 4 Eligible costs

1. Having the Project approved for implementation and signing the Agreement does not mean that all expenses incurred by the Unit and the Recipient during the Project's implementation will qualify for co-financing. Whether expenses are eligible will also be assessed in the course of the Project, when the Recipient and the Unit submit their reports.
2. Expenses that qualify for co-financing are those which fulfil all of the following conditions:
 - 1) they were actually incurred in the period applicable to eligible costs, i.e. the period specified in § 2 section 1,
 - 2) they are compatible with binding Community regulations and national laws,
 - 3) they are compatible with the provisions of the IE OP,
 - 4) they are compatible with the categories of expenses from the approved Project budget,
 - 5) they are essential for project completion and were incurred in connection with the Project's implementation,
 - 6) they were incurred in an economical way, i.e. based on the principle of achieving the planned effects for the lowest possible spending,
 - 7) they are properly documented,
 - 8) they have not been excluded by the Management Institution of the IE OP.

§ 5 Reporting

1. The Recipient will submit reports, in electronic form and a hard copy, according to the specimen which constitutes enclosure 2 to the Agreement.
2. The Recipient is obligated to:
 - 1) promptly, and no later than in his/her periodical reports, to inform the Foundation of problems with carrying out the Project, including his/her intention to halt its implementation.
 - 2) inform the Foundation in his/her periodical reports of any unutilized funding and the reason why it has not been utilized,
 - 3) prepare reports on the Project's implementation:
 - a) a periodical report within 25 days of the end date of the reporting period. The binding six-month reporting periods are from 1 May to 31 October and from 1 November to 30 April, where the first report will cover the period from the project implementation starting date to the

- end of the current reporting period, while the last reporting period is defined by the Project implementation closing date,
- b) a mid-term report at the time of the periodical report for the fifth reporting period,
 - c) an end report within 25 days of the Project implementation closing date as specified in § 2 section 1.
3. Together with the periodical report, the Recipient is obligated to submit detailed accounting of any awarded funds spent in the reporting period. The periodical report should be accompanied by copies, certified as conforming to the original, of the following documents confirming expenses incurred in accordance with the Project budget:
- 1) invoices and other bookkeeping documents of equal validity filled in according to legal regulations and containing:
 - a) bookkeeping specifications,
 - b) information on partial funding of the purchase from EU structural funds under the Agreement (agreement No., project name),
 - c) confirmation of proper compliance with the terms of the agreement with the contractor,
 - d) information on application of the law on public orders,
 - e) the number or name of the specific item from the budget.
 - 2) confirmation of payment or bank statements documenting operations.
4. The Recipient's periodical reports should also be accompanied by a list of the documents confirming any expenses incurred. The Foundation may demand to see the originals of all or selected documents confirming such expenses.
5. If the PhD students specified in § 3 section 4 item 3 letter b exercise their right to voluntary pension insurance coverage, the Recipient is obligated to include copies, certified as conforming to the original, of documents confirming registration for the above insurance and payment of the relevant premiums by those persons.
6. If any major oversights or mistakes are found in the reports sent to the Foundation, and in particular:
- 1) a lack of documents specified in § 5 section 2, section 3 and section 4,
 - 2) arithmetic mistakes or errors in qualifying any expenses incurred,
 - 3) a lack of information required by the specimen report,
 - 4) a lack of the signature of the Recipient and the Unit's authorized representative, and in the case of copies of documents, a lack of the annotation "certified as conforming to the original" by an authorized person,
 - 5) expenses incompatible with the Project budget,
- the Recipient is obligated, under pain of having the next instalment of funds for the Project suspended, to provide the corrected versions within 14 days of the date of receipt of the Foundation's remarks. The Foundation may send its remarks on the report by electronic mail or by fax.
7. The Unit is obligated to prepare the financial part of the reports specified in § 5 section 2 and to prepare the documentation specified in § 5 section 3 and section 4, and to provide them to the Recipient within a time enabling the Recipient to submit a complete report, but no later than 20 days from the end of the reporting period as specified in § 5 section 2 item 3.

§ 6 Monitoring and inspections

1. The Recipient and the Unit agree they will be subject to inspection during the Project's implementation, by the Foundation or other institutions authorized to conduct an inspection on the basis of separate regulations, and when requested by these institutions - to produce any and all documentation related to the Project.
2. The Recipient and the Unit will ensure inspectors full access to areas and premises where the Project is being carried out and to documents, including financial documents and electronic documents related to the Project's implementation.
3. Failure to produce all the required documents will be treated as an obstruction of the inspection as specified in § 10 section 4 item 3.
4. During an inspection, all persons authorized to provide explanations on issues related to the Project's implementation must be present.
5. Inspections may be conducted at any time during the Project's implementation and over a period of 3 years from the closing date of the IE OP.
6. An inspection may be conducted both at the Unit's headquarters and at the location of the Project's implementation.

7. 10 days before the date of an inspection the Foundation will send the Recipient and the Unit notification. The other institutions authorized to conduct an inspection under separate regulations will inform the Unit of a planned inspection within a time specified in those regulations.
8. The Foundation reserves the right to conduct an immediate inspection when acting upon information about irregularities in the Project's implementation.
9. The Foundation will prepare an inspection report from its inspection. If recommendations are issued, the Recipient and the Unit are obligated to comply with them within the time specified in the inspection report.
10. The Unit agrees to store documentation related to the Project's implementation for a period of 3 years from the closing date of the IE OP in a way that ensures accessibility, confidentiality and security, and to inform the Foundation of the location where the documents related to the Project's implementation are archived.
11. If the necessity arises to extend the time specified in § 6 section 10, the Foundation will inform the Unit of this fact before that time is up.
12. If the location where the documents are archived is changed within the time specified in § 6 section 10, the Unit agrees to inform the Foundation of the location where the documents related to the Project's implementation are archived.
13. Upon written demand from the Foundation, the Recipient and the Unit agree to present all information and explanations related to the Project's implementation within the time specified in the demand.

§ 7 Information obligations

The Recipient and the Unit agree to inform public opinion that the Project's implementation is financed with the help of funding from the European Union, in accordance with Commission Regulation (EC) No. 1828/2006 of 8 December 2006 setting out rules for the implementation of Council Regulation (EC) No. 1083/2006 laying down general provisions on the European Regional Development Fund, the European Social Fund and the Cohesion Fund, and with Regulation (EC) No 1080/2006 of the European Parliament and of the Council on the European Regional Development Fund (Official Journal of the EU L 371 of 27.12.2006, Official Journal of the EU L 45 of 15.02.2007).

1. The Recipient and the Unit agree to mark documents related to the Project's implementation, promotional and information materials as well as assets depreciated within the Project with:
 - 1) the European Union emblem,
 - 2) the IE OP logo (this does not apply to minor promotional materials),
 - 3) the Foundation's logo.
2. On the occasion of conferences, seminars and other kinds of public presentations, the Recipient and the Unit agree to publicize both the fact that the Project is supported from funding provided by the European Union as part of the IE OP and the Foundation's role.
3. The Foundation reserves the right to publicly present the Recipient and his/her achievements.
4. Once the performance of the Agreement has been completed, the Recipient may be obligated to publicly present the results of the Project in a form, venue and time specified by the Foundation.

§ 8 Personal data protection

1. The Foundation hereby declares it is the administrator of the personal data included in the Agreement and that the data will be processed in accordance with the law of 29 August 1997 on personal data protection (Dz. U./Journal of Laws 2002 No. 101, item 926, as amended) for the purpose of implementing the Agreement, monitoring, inspecting and evaluating the programme as well as for archiving purposes and publicizing information on the Foundation's new programmes. The Foundation wishes to make it clear that providing personal data is voluntary but necessary to conclude the Agreement.
2. With respect to the personal data provided to the Foundation, the Recipient is entitled to all the rights stemming from the law specified in article 32, and in particular the right to access the data and to lodge a protest.

§ 9 Changes to the Agreement and the Project

1. Substantial modifications to the Project as defined in article 57 of Council Regulation (EC) No. 1083/2006 are inadmissible and will constitute grounds for terminating the Agreement without notice.
2. It is possible during the Project's implementation to move funding between the different categories of eligible costs specified in the Project budget, in the project part, up to 10% of the amount specified in the original budget approved by the Foundation for the category within which the reallocation is being made.

The Recipient will inform the Foundation of such movement of funding in his/her periodical report, to which he/she will also attach the amended Project budget.

3. Reallocation of spending between the categories may not lead to changes in grant amounts nor to any exceeding of the maximum percentage value of funding in the individual categories specified in the competition documentation.
4. If it turns out during the Project's implementation that the Project requires major modifications other than the changes specified in § 9 section 2, the Recipient is obligated to inform the Foundation in writing of the proposed changes, providing substantive grounds and proposed changes to the budget in the individual accounting periods. The decision will be made by the Foundation Board by way of a resolution. Approved modifications require an annexe to the Agreement.
5. Modifications must be submitted no later than 3 months before the end of the Project's implementation.
6. If the Foundation finds that there is unutilized funding in the Project or the Recipient has failed to give reasons for not utilizing funds, the Foundation has the right to reduce the Project budget and draw up the relevant annexe to the Agreement.
7. The Foundation has the right to reduce the total amount of funding specified in § 1 or initiate an amendment to the provisions of the Agreement if it sees such a need, in particular following the analysis of reports and inspections or failure to achieve the planned results (including the suspicion of such failure) at a given stage of the Project.
8. Changes to the Application or the Project budget must be made in the form of an annexe to the Agreement.

§ 10 Termination of the Agreement

1. The Agreement may be terminated at the unanimous wish of the Parties if circumstances arise which preclude further performance of the provisions of the Agreement.
2. Termination of the Agreement under § 10 section 1 does not release the Recipient and the Unit from the obligation to submit a final report within 30 days of the termination of the Agreement and to account for funds obtained to finance the Project. The unutilized part of the funding is subject to reimbursement to the account specified by the Foundation.
3. If the Agreement is terminated under § 10 section 1 the Recipient and the Unit have the right to spend exclusively that part of funding received to finance the Project which corresponds to the properly implemented part of the Project.
4. The Foundation has the right to terminate the Agreement immediately if:
 - 1) the Recipient delays the start of Project implementation for a period of more than 2 months from the Project's planned starting date and fails to inform of the reasons for the delay, has abandoned implementation of the Project, or is implementing the Project in violation of the provisions of the Agreement,
 - 2) the Recipient has not held an open recruitment of young researchers for the team in accordance with the competition documentation, or fails to fulfil the obligations specified in § 3 section 8,
 - 3) the Recipient fails to achieve the planned objective of the Project for reasons caused by the Recipient,
 - 4) the Recipient or the Unit refuses to allow or obstructs the inspection specified in § 6,
 - 5) the Recipient or the Unit fail to remove any irregularities within the time specified by the Foundation,
 - 6) the Recipient or the Unit fail to present the reports specified in § 5 within the specified time and on the specified terms,
 - 7) the Recipient or the Unit present the reports specified in § 5 but these do not correspond to the actual state of matters,
 - 8) the Recipient or the Unit fail to fulfil the obligations specified in § 7,
 - 9) the Unit fails to fulfil the obligations specified in § 1 section 4, 5 or in § 3 section 14,
 - 10) the Recipient or the Unit present false or incomplete statements or documents in order to obtain funding,
 - 11) the Recipient violates the rules of the code of ethics of the Foundation's recipients/winners and beneficiaries,
 - 12) the Unit violates the obligations stemming from § 1 section 7.
5. If the Agreement is terminated for the reasons specified in § 10 section 4 the Recipient and the Unit are not entitled to any damages.

§ 11 Reimbursement

1. If the Agreement is terminated for reasons specified in § 10 section 4, upon the Foundation's demand the Recipient and the Unit will return all of the funds transferred under the Agreement within 14 days of the date of receipt of the demand, plus interest in an amount equal to that calculated for overdue taxes, counted from the date of transfer of the funds to the Recipient and the Unit to the date of their return to the bank account specified by the Foundation.
2. If the Agreement is terminated for reasons specified in § 10 section 1, upon the Foundation's demand the Recipient and the Unit will return all of the funds transferred under the Agreement within 14 days of the date of receipt of the demand, plus interest in an amount equal to that calculated for overdue taxes, counted from the date of transfer of the funds to the Recipient and the Unit to the date of their return to the bank account specified by the Foundation. In particularly justified cases, upon the Recipient's written request, the Foundation may refrain from demanding reimbursement of funding already paid out or refrain from demanding interest, bearing in mind in particular the way in which the Recipient and the Unit performed the Agreement.
3. To collect its due funds, the Foundation may authorize a third party to act on its behalf. The Foundation will inform the Recipient and the Unit of such authorization within 7 days of its issuing.

§ 12 Concluding provisions

1. On matters not covered by the Agreement, the Civil Code and other legal regulations apply.
2. Any disputes arising in connection with performance of the Agreement will be resolved amicably by the Parties or, if no agreement can be reached, by the general court proper for the headquarters of the Foundation.
3. Any amendments or supplements to the Agreement must be in writing upon pain of nullity.
4. Any written correspondence in connection with performance of the Agreement will be addressed by the Foundation to:
correspondence address:
fax:
e-mail:.....
6. The Agreement has been drawn up in four identical copies, two for the Foundation and one each for the Recipient and the Unit.
7. The following enclosures constitute an integral part of the Agreement:
 1. Enclosure 1: Application No.
 2. Enclosure 2: Specimen report (scientific report and financial statements)
 3. Enclosure 3: A statement on not taking advantage of assistance from domestic or Community public funding with regard to eligible costs covered by the agreement on funding for the project
 4. Enclosure 4: Power of attorney (required if the application is signed by a person or persons without legal authority to represent the applicant).

Foundation

Recipient

Unit

.....

.....

.....

Enclosure 8.2 **Sample agreement on a research stipend in the Welcome Programme**

SPECIMEN
**AGREEMENT ON A RESEARCH STIPEND
WELCOME PROGRAMME**

Agreement No.:

Date of signing by the Foundation for Polish Science:

Date of signing and the number of the agreement on funding for a project in the Welcome Programme:

Agreement on a research grant in the Welcome Programme carried out as part of the Innovative Economy Operating Programme, Priority 1. Research and development of new technologies, Action 1.2. Strengthening the human resources potential of science, Welcome Programme, hereafter referred to as “the **Agreement**”, concluded between:

the Recipient in the Welcome Programme,

Mr. / Ms.

address hereafter referred to as “the **Recipient**”

and

The Foundation for Polish Science, with its headquarters in Warsaw 02-548, ul. Grażyny 11, entered in the National Court Register maintained by the district court for Warsaw, XIII Economic Department, under number 0000109744, represented by Prof. Maciej Żylicz PhD hab., hereafter referred to as “the **Foundation**”,

and

Mr./Ms.

born (date)..... in.....,

telephone:

e-mail:

resident at:

holding the following ID

PESEL (personal identity number)

hereafter referred to as “the **Stipend Holder**”, hereafter jointly referred to as “the **Parties**”,

as follows:

§ 1

The subject of the Agreement is a personal research stipend awarded to the Stipend Holder in accordance with the Recipient’s application, from the funds of the project (project name), along the rules specified in the competition documentation of the Welcome programme for competition, with the aim of supporting the Stipend Holder’s research activity, hereafter referred to as “the **Stipend**”.

§ 2

1. The Stipend Holder declares that he/she:

- 1) has the status of a graduate student who has completed his/her third year/a PhD student/a young PhD*,
- 2) has been selected to carry out the project by way of an open competition maintaining the standards set down in the competition documentation,
- 3) plans to defend his/her master’s thesis/doctoral dissertation* in (mm/yyyy):

2. A Stipend Holder who has the status of a PhD student declares that:

- 1) during the time of receiving the stipend, he/she will exercise the right to voluntary pension insurance in accordance with article 7 of the law on social insurance (Dz.U./Journal of Laws 1998, No. 137, item 887, as amended). The base amount for the premium is at least PLN 1,800,*

- 2) during the time of receiving the stipend, he/she will not exercise the right to voluntary pension insurance in accordance with article 7 of the law on social insurance (Dz.U./Journal of Laws 1998, No. 137, item 887, as amended) because he/she is covered by pension insurance from another source.*

§ 3

The Recipient declares that:

- 1) he/she has selected the Stipend Holder in accordance with the rules of an open competition set down in the competition documentation and the application,
- 2) he/she has designed the project budget to include funding corresponding to the time of payment of the Stipend and its amount as specified in the competition documentation.

§ 4

1. The Stipend is awarded for a period of ... months, i.e. from to, and its monthly amount is PLN (in words: zlotys).
2. The Stipend will be paid out during the period when the Stipend Holder has the status specified in § 2 section 1; the Stipend may be paid out for the period up to the end of the month following the date of the defence of the master's thesis (graduate students) or doctoral dissertation (PhD students).
3. The Stipend will be paid by the Foundation to the Stipend Holder's account, No., according to the terms and deadlines specified in the Agreement concluded between the Foundation and the Recipient on (date), hereafter referred to as "the **Welcome Agreement**", conditional upon the Foundation's approval of successive periodical reports from the implementation of the whole project.

§ 5

Throughout the period of receiving the Stipend, the Stipend Holder is in particular obligated to:

1. continue his/her research under the Recipient's leadership,
2. mark publications and other materials produced as part of the Stipend with the emblem of the EU and the Innovative Economy Operational Programme, and the Foundation's logo,
3. promptly inform the Foundation of any changes to his/her contact/address data, bank account number or any other changes that could have an impact on transfer of the Stipend. The Stipend Holder's written statement with such information does not necessitate any amendment to the Agreement, nor does an Annexe have to be signed by all the Parties,
4. immediately inform the Foundation if he/she loses the status specified in § 2 item 1.

§ 6

1. The Stipend Holder's periodical and end reports from his/her research during the time he/she receives the Stipend will constitute an enclosure to the Recipient's reports submitted within the deadlines set down in the Welcome Agreement.
2. The Stipend Holder's reports should cover all activities related to the Stipend Holder's research work in the current reporting period covered by the Stipend.
3. The specimen report constitutes Enclosure 1 to the agreement.
4. The Stipend Holder will submit his/her report to the Recipient, in electronic form and a hard copy, within a time allowing the Recipient to prepare his/her report for the Foundation.

§ 7

Apart from the reports, a Stipend Holder with the status of a PhD student who exercises his/her right to voluntary pension insurance is obligated to provide the Recipient with copies of documents confirming registration for the above insurance and payment of premiums.

§ 8

1. In justified cases the Foundation has the right, on its own initiative or upon a motion from the Recipient, to change its decision on awarding a Stipend, and in particular to stop payments, if the Stipend Holder no longer fulfils the conditions of receiving the Stipend, and in particular if the Stipend Holder:
 - 1) has lost the status specified in § 2 item 1,
 - 2) has failed to fulfil the obligations set down in § 5,
 - 3) has abandoned his/her research work,
 - 4) is staying at a foreign research centre for purposes not directly related to the project,
 - 5) has violated the principles set down in the code of ethics of winners/recipients and beneficiaries of the Foundation.

2. In a situation when the Stipend Holder did not meet the conditions specified in the competition documentation or the Agreement at the time he/she signed the Agreement, the Foundation has the right, at its own initiative or upon a motion from the Recipient, to revoke the decision on awarding the Stipend.

§ 9

The Recipient is obligated immediately to submit a written application to the Foundation, together with justification for changing the decision on awarding a stipend, specifying the decision he/she is applying for to the Foundation (revocation or halting of payments of the Stipend), when circumstances arise that justify such a decision, and in particular the circumstances specified in § 8.

§ 10

If the Foundation decides to revoke the Stipend, the money is subject to reimbursement within 14 days of the date of receipt of the demand, plus interest in an amount equal to that calculated for overdue taxes, counted from the date of transfer of the funds to the Stipend Holder to the date of their return to the bank account specified by the Foundation. In particularly justified cases, upon the Recipient's or Stipend Holder's written request, the Foundation may refrain from demanding reimbursement of funding already paid out or refrain from demanding interest, bearing in mind in particular the way in which the Stipend Holder performed the Agreement.

§ 11

Any costs of securing the return of the Stipend and any documented costs of debt collection proceedings will be borne by the Stipend Holder.

§ 12

1. The Foundation hereby declares it is the administrator of the personal data included in the Agreement and that the data will be processed in accordance with the law of 29 August 1997 on personal data protection (Dz. U./Journal of Laws 2002 No. 101, item 926, as amended) for the purpose of promoting the results of the Welcome Programme, and also for monitoring, inspecting and evaluating the programme as well as for archiving purposes and publicizing information on the Foundation's new programmes. The Foundation wishes to make it clear that providing personal data is voluntary but necessary to conclude the Agreement.
2. With respect to the personal data provided to the Foundation, the Stipend Holder and the Recipient are entitled to all the rights stemming from the law specified in article 32, and in particular the right to access the data and to lodge a protest.

§ 13

Any amendments or supplements to the Agreement must be in writing upon pain of nullity.

§ 14

On matters not covered by the Agreement, the regulations of the Civil Code apply.

§ 15

Any disputes arising in connection with performance of the Agreement will be resolved amicably by the Parties or, if no agreement can be reached, by the general court proper for the headquarters of the Foundation.

§ 16

1. The Agreement has been drawn up in four identical copies, two for the Foundation and one each for the Stipend Holder and the Recipient.
2. *Enclosure 1: Specimen report* constitutes an integral part of the present agreement.

FOUNDATION

STIPEND HOLDER

RECIPIENT

.....

.....

.....

*Delete as applicable

Enclosure 8.3 Project budget

PROJECT BUDGET											
No.	Category	Planned costs									
		1st reporting period	2nd reporting period	3rd reporting period	4th reporting period	5th reporting period	6th reporting period	7th reporting period	8th reporting period	9th reporting period	10th reporting period
I	stipends										
1.1	stipends for graduate students										
1.2	stipends for PhD students										
1.3	stipends for postdoctoral fellows										
1.4	stipends for the foreign researcher										
II	project										
2.1	remuneration and non-remuneration costs of labour for the persons carrying out the project										
2.2	depreciation of fixed assets, intangible fixed assets and developed real estate										
2.3	spending on laboratory equipment										
2.4	spending on materials, software, and software licences										
2.5	spending on research services as well as technical and financial expert opinions										
2.6	spending on publications, database access, and other paid information sources										
2.7	spending on patent protection and intellectual property consultancy, including the fees for the first patent application resulting from the project										
2.8	spending on promoting the project, including promotion of the project's results										
2.9	spending on publishing the research results in Open Access periodicals										
2.10	spending on international exchange and domestic business trips										
III	general costs										
TOTAL											

Six-month reporting periods apply, from 1 May to 31 October and from 1 November to 30 April; the first report shall cover the period from the starting date of the project's implementation until the end of the current reporting period, while the end of the last reporting period is defined by the date of the project's completion.

Enclosure 8.4 Project schedule

No.	Task	1st reporting period	2nd reporting period	3rd reporting period	4th reporting period	5th reporting period	6th reporting period	7th reporting period	8th reporting period	9th reporting period	10th reporting period
1.	Recruitment of young researchers for the team										
2.	Commencement of research										
3.	Research tasks (start/finish)*										
3.1											
4.	Purchase of research equipment*										
4.1											
5.	Scheduled master's thesis defences										
6.	Scheduled doctoral dissertation defences										
7.	Scheduled postdoctoral dissertation defences										
8.	Promotion of the project (stages)*										
8.1											
8.2											

* Number of items to be modified according to need

Enclosure 8.5 Statement of VAT qualification

Name and address of unit

(Place and date)

STATEMENT

In connection with applying for funding from the Innovative Economy Operational Programme within the Welcome Programme for implementation of the Project (*project name*).....,(*unit name*)..... hereby declares that in implementing the above Project it has no means of recovering the cost of value-added tax (VAT) whose amount has been included in the Project budget.

At the same time,(*unit name*)..... agrees to return any VAT refunded within the Project (*project name*)..... if circumstances emerge which enable(*unit name*)..... to be reimbursed for the said tax.

.....
(signature and official stamp of the unit manager)

.....
(signature and official stamp of the chief accountant)

Enclosure 8.6 **Statement that the applicant does not take advantage of domestic or Community public funds with regard to eligible costs covered by the agreement on funding for the project**
(enclosure to the agreement)

Name and address of unit

(Place and date)

STATEMENT

In connection with(*name of unit and its legal status*)..... having been awarded funding from the Innovative Economy Operational Programme within the Welcome Programme for implementation of the Project(*project name*)....., I hereby declare that the eligible costs involved in implementing the above-mentioned Project have not been and will not be financed from other domestic or Community public funds.

.....
(signature of the project leader)

.....
(signature and official stamp of the unit manager)

.....
(signature and official stamp of the chief accountant)

Enclosure 8.7 **Specimen report of the recipient on the project's implementation (scientific report and financial statements)**

**RECIPIENT'S REPORT – scientific report
WELCOME PROGRAMME**

Project name:	
Reporting period	<input type="checkbox"/> periodical report for the period from to <input type="checkbox"/> mid-term report <input type="checkbox"/> end report
Number of reporting period	
Agreement No.:	
Recipient:	
Telephone:	
E-mail:	

NB: The information provided below should exclusively concern the implemented project in the reporting period specified above (not applicable to item 11).

<p>1. INFORMATION ON RESEARCH PROGRESS (max. 1000 words; mid-term report max. 2000 words)</p> <p>1.1. <i>Progress in the research tasks</i></p> <p>1.2. <i>Summary of the results of the above-mentioned tasks</i></p> <p>1.3. <i>Information on master's theses, obtained scientific degrees and titles (PhDs, postdoctoral degrees, etc.)</i></p>
<p>2. TEAM MEMBERS (first names and surnames)</p> <p>2.1 <i>Young researchers involved in the project's implementation (including the starting and closing date of their work on the team):</i></p> <p>a. <i>graduate students</i></p> <p>b. <i>PhD students</i></p> <p>c. <i>postdoctoral fellows</i></p>

- 2.2 *Researchers involved in the team's work (including the starting and closing date of their work on the team):*
- a. *whose remuneration is refunded from the funding for the project (including what percentage of remuneration corresponding to the time spent on the project is refunded, e.g. 25% of a full-time job)*
 - b. *others*

3. INFORMATION ON RECRUITMENT OF TEAM MEMBERS

- 3.1. *Brief description of information and promotion activity targeted at prospective young team members*
- 3.2. *Candidate selection criteria*
- 3.3. *Brief description of the team member selection procedure*
- 3.4. *Number of applications submitted*
- 3.5. *Number and status of team members selected*

4. SCIENTIFIC ACHIEVEMENTS

- 4.1. *Original scientific publications published in the reporting period:*
- a. *in reviewed publications from the Philadelphia Institute for Scientific Information list:*
 - b. *in Open Access publications*
 - c. *other*
- 4.2. *Publications in which graduate students were involved (all publications involving graduate students on the team listed in item 4.1)*
- 4.3. *Publications in which PhD students were involved (all publications involving PhD students on the team listed in item 4.1)*
- 4.4. *Publications in which postdoctoral fellows were involved (all publications involving postdoctoral fellows on the team listed in item 4.1)*
- 4.5. *Prizes and awards*
- 4.6. *Patent applications*

<p>4.7. <i>Patents</i></p> <p>4.8. <i>Protection rights and utility designs</i></p>
<p>5. CONFERENCES</p> <p>5.1 <i>Team members' participation in domestic and international conferences (first name and surname, name of conference, country, length of stay, title and type of presentation):</i></p> <p>5.2 <i>Conferences in which team members were involved as organizers:</i></p>
<p>6. SCIENTIFIC EXCHANGE</p> <p>6.1 <i>Research visits abroad (first name and surname, host centre, country, length of stay, purpose of visit):</i></p> <p>6.2 <i>Domestic research visits (first name and surname, host centre, length of stay, purpose of visit):</i></p> <p>6.3 <i>Guests from domestic and foreign institutions invited by the team (first name and surname, centre, country, length of stay, purpose of visit):</i></p>
<p>7. IS THE PROJECT COMPATIBLE WITH THE HORIZONTAL POLICIES SPECIFIED IN ARTICLES 16 AND 17 OF COUNCIL REGULATION (EC) NO. 1038/2006 (i.e. the policy of equal opportunities and environmental protection, and whether the project is carried out in compliance with the principle of sustainable development)?</p> <p>YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p><i>If Community policies are not being followed, please provide an explanation as to what irregularities there have been and what remedial action has been planned and undertaken.</i></p>
<p>8. INFORMATION ON PARTNERS</p> <p>8.1. <i>Description of co-operation with foreign partners</i></p> <p>8.2. <i>Description of co-operation with domestic partners</i></p>
<p>9. ADDITIONAL INFORMATION</p> <p>9.1. <i>Other important information relevant to the project</i></p>
<p>10. SUMMARY OF RESEARCH PROGRESS IN ENGLISH (max. 500 words, mid-term report max. 1000 words)</p>

11. TASKS COMPLETED SINCE THE START OF THE PROJECT

No.	Task	1st reporting period **	2nd reporting period	3rd reporting period	4th reporting period	5th reporting period	6th reporting period	7th reporting period	8th reporting period	9th reporting period	10th reporting period	11th reporting period
1.	Recruitment of young researchers for the team											
2.	Commencement of research											
3.	Research tasks (start/finish)*											
3.1												
3.2												
4.	Scheduled master's thesis defences											
5.	Scheduled doctoral dissertation defences											
6.	Scheduled postdoctoral dissertation defences											
7.	Promotion of the project (stages)*											
7.1												
7.2												

Date:

.....
Recipient's signature

* Number of items to be modified according to need

** Six-month reporting periods apply, from 1 May to 31 October and from 1 November to 30 April; the first report shall cover the period from the starting date of the project's implementation until the end of the current reporting period, while the end of the last reporting period is defined by the date of the project's completion.

NB:

The reports of the individual team members selected in an open competition should be attached to the report.

REPORT – financial statement

Programme	<input type="checkbox"/> VENTURES	<input type="checkbox"/> TEAM	<input type="checkbox"/> WELCOME	<input type="checkbox"/> IPP
Agreement No.				
Project name				

Recipient (first name, surname, e-mail, telephone and fax number)	
Name and address of unit	
Person preparing the financial statement (first name, surname, e-mail, telephone and fax number)	

Expenses for the period	From	To
Value of eligible costs covered by the report		

FINANCIAL PROGRESS OF PROJECT IMPLEMENTATION				
No.	Category	expenses in the reporting period	expenses since the start of the project	% utilization
I	stipends	0	0	
1.1	stipends for graduate students			
1.2	stipends for PhD students			
1.3	stipends for postdoctoral fellows			
1.4	stipends for the foreign researcher - project leader			
II	project	0	0	
2.1	remuneration and non-remuneration costs of labour for the persons carrying out the project			
2.2	depreciation of fixed assets, intangible fixed assets and developed real estate			
2.3	spending on laboratory equipment			

2.4	spending on materials, software, and software licences			
2.5	spending on research services as well as technical and financial expert opinions			
2.6	spending on publications, database access, and other paid information sources			
2.7	spending on patent protection and intellectual property consultancy, including the fees for the first patent application resulting from the project			
2.8	spending on promoting the project, including promotion of the project's results			
2.9	spending on publishing the research results in Open Access periodicals			
2.10	spending on international exchange and domestic business trips			
III	general costs			
TOTAL		0	0	

LIST OF EXPENSES INCURRED *							
No.	document No.	item No. in document	No. in the books or register	date of payment	name of goods or service	amount of eligible costs	No. of item in the project budget
1							
2							
3							
4							
5							
6							
7							

No.	SETTLEMENT OF ADVANCE PAYMENTS *	
1	total value of the project	
2	funding transferred so far	
3	amount accounted for with the Foundation so far	
4	amount of funding received remaining to be accounted for (item 2 - item 3)	0
5	amount accounted for in the present report	

6	amount remaining to be accounted for (items: 2-(3+5))	0
---	---	---

VALUE OF INTEREST* accrued on the funding transferred to the unit	
in the period covered by the report	

I, the undersigned, hereby declare that the information contained in the statement is true, and the listed expenses have been paid for. I am aware of the criminal responsibility stemming from article 271 of the penal code in cases of corroborating false information concerning circumstances of legal significance. I declare that the documentation related to the project is stored at (place and address):

Enclosures:*

1. Copies of invoices and other bookkeeping documents of equal validity, certified as conforming to the originals, according to the list of expenses incurred, together with confirmation of payment (unless the Recipient has been released from the obligation to attach these documents to the report).
2. Copies of documents confirming receipt/completion of assignments, certified as conforming to the originals.
3. Other documents if required under the agreement.

* not applicable to the mid-term report

Date:

Chief accountant/finance officer

Project leader

Official stamp of the unit

.....

.....

.....

Enclosure 8.8 **Specimen report of a team member on the project's implementation**

**TEAM MEMBER'S REPORT – scientific report
WELCOME PROGRAMME**

Project name:	
Reporting period	<input type="checkbox"/> periodical report for the period from to <input type="checkbox"/> end report
Number of reporting period	
Agreement No.:	
Recipient:	
First name and surname of team member	
Team member's status	<input type="checkbox"/> graduate student <input type="checkbox"/> PhD student <input type="checkbox"/> postdoctoral fellow
Telephone:	
E-mail:	

NB: The information provided below should exclusively concern the implemented project in the reporting period specified above (not applicable to item 7).

<p>1. INFORMATION ON RESEARCH PROGRESS (max. 300 words)</p> <p>1.4. <i>Progress in the research tasks</i></p> <p>1.5. <i>Summary of the results of the above-mentioned tasks</i></p> <p>1.6. <i>Information on starting/ending work on the team</i></p> <p>1.7. <i>Information on the date of the master's thesis/doctoral dissertation/postdoctoral dissertation defence*</i></p> <p>*delete as applicable</p>
<p>2. SCIENTIFIC ACHIEVEMENTS</p>

2.1. Original scientific publications:

d. in reviewed publications from the Philadelphia Institute for Scientific Information list:

e. in Open Access publications

f. other

2.2. Prizes and awards**2.3. Patent applications****2.4. Patents****2.5. Protection rights and utility designs****3. CONFERENCES**

3.1 Participation in domestic and international conferences (name of conference, country, length of stay, title and type of presentation):

3.2 Participation in the organization of conferences:

4. SCIENTIFIC EXCHANGE

4.1 Research visits abroad (host centre, country, length of stay, purpose of visit):

4.2 Domestic research visits (host centre, length of stay, purpose of visit):

5. ADDITIONAL INFORMATION

5.1. Other important information relevant to the project

6. SUMMARY OF RESEARCH PROGRESS IN ENGLISH

(max. 250 words)

7. TASKS COMPLETED SINCE THE START OF THE PROJECT

No.	Task	1st reporting period ***	2nd reporting period	3rd reporting period	4th reporting period	5th reporting period	6th reporting period	7th reporting period	8th reporting period	9th reporting period	10th reporting period	11th reporting period
1	Start of work on the team											
2.	Scheduled defence of master's thesis/doctoral dissertation/postdoctoral dissertation*											
3.	Research tasks (start/finish)**											
3.1												
3.2												
3.3												
3.4												

Date:

.....
Team member's signature

* delete as applicable

** number of items to be modified according to need

*** six-month reporting periods apply, from 1 May to 31 October and from 1 November to 30 April; the first report shall cover the period from the starting date of the of work on the team until the end of the current reporting period, while the end of the last reporting period is defined by the date of the project's completion.

NB: The number of the reporting period is the same as the number of the reporting period submitted by the project leader.

Enclosure 8.9 - Description of the *Bio, Info, Techno* subject areas

Bio:

- Biotechnology and bioengineering
- Biological advances in agriculture and environmental protection
- New medical products and techniques

Info:

- Information and telecommunications technologies
- New-generation intelligent, telecommunications, and data communications networks
- Optoelectronics
- Computational sciences

Techno:

- New materials and technologies
- Nanotechnologies
- Dedicated systems design
- Mechatronics
- Chemical technology and engineering

Enclosure 8.10 - Specimen of the project's logos

