

## Staff Exchange programme for selected EURIZON Fellowship teams

### FRAMEWORK GUIDELINES

*This document provides invited EURIZON fellowship teams with an overview of key rules for the staff exchange program, assisting them in deciding whether and how to pursue this opportunity.*

The Staff/Knowledge Exchange Programme (SE) will facilitate the travel of a selection<sup>1</sup> of teams awarded within the Fellowship Programme “Remote Research Grants” (9.1.1), to their European partners’ facilities. Alternatively, if conditions permit, European partners may travel to visit their Ukrainian teams. The Staff exchange programme will support the travel and accommodation costs of the traveling team delegations.

This initiative aims to **foster mutual cooperation, facilitate knowledge exchange, and provide Ukrainian teams with deeper insights into European Research Organisations. By doing so, it aims to support their effective integration into the European Research landscape in the future.**

Priority for this opportunity is granted to EURIZON Fellowship teams led by young scientists and female scientists, who have received a specific invitation. Ukrainian delegations will be hosted at the research institutes and facilities of their European partners. When conditions are safe, feasible, and beneficial to the research project and the Ukrainian team, European experts may alternatively travel to Ukraine to collaborate with their partner teams and organizations on-site.

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### 1- Purposes of the Programme

The Staff/Knowledge programme (SE) is designed to stimulate strong interactions between the Ukrainian teams and their European partners and to boost their long-term cooperation, mutual knowledge and/or the achievement of their joint research project. The aim of the exchanges is to facilitate the collaboration between teams, to foster a shared culture of research and innovation, supporting reciprocal learning, best practice and knowledge exchange in the future perspective of the integration of Ukrainian science in the European Research Area.

While this program can facilitate a two-way staff/knowledge exchange scheme between Ukrainian teams and their European partner institutes, given the ongoing conflict and associated safety concerns, it is advisable for Ukrainian delegations to travel to Europe as a precautionary measure. European partners may benefit from the support of the EURIZON Staff Exchange opportunity to visit their

<sup>1</sup> The selection prioritizes teams led by women scientists and young scientists.

partners in Ukraine only if general safety conditions permit and if such visits are deemed necessary and beneficial for the implementation of the joint research program.

We recommend that traveling teams avoid risks as much as possible and adhere to the safety and security guidelines provided by their institutes. Please note that DESY/EURIZON cannot be held responsible for any damage or accidents that may occur during the travel/exchange.

The delegations of the selected teams will arrange visits to partner facilities to strengthen the partnership and promote joint research efforts. **EURIZON will cover travel and subsistence costs for these visits, up to a maximum fixed amount per team.**

## 2- Eligibility and Selection of the participants

### Who is eligible to apply?

This program is dedicated exclusively to a selection of teams awarded the “*EURIZON Remote Research Grants for Ukrainian Researchers*”. All teams led by Women Principal Investigators (PI) and Young Principal Investigators (<45 years old) were given the priority and received a formal invitation.

The designated Principal Investigator and their team members are eligible to apply for visits to their European partner institutes. Alternatively, if conditions permit and it is deemed safe, European partners may be invited to visit their counterparts’ home institutes in Ukraine.

We strongly recommend prioritizing the participation of young scientists and women team members in the staff exchange to maximize the program's impact and inclusivity.

All participants are responsible for adhering to travel regulations set by Ukrainian authorities; DESY/EURIZON assumes no responsibility for any violations of Ukrainian law by participants or visitors.

Due to budget constraints, the Staff Exchange Program can accommodate only a limited number of exchange visits, with a **maximum allocation of €4.500 per team to cover travel, accommodation and support subsistence.**

If one of the selected teams is unable to participate to the SE programme, the opportunity will be extended to the first non-selected highest-ranked team within the same thematic field.

## 3- Staff exchange activities

Staff and knowledge exchanges between European and Ukrainian research teams can involve various activities aimed at promoting joint collaborations, knowledge sharing, and skill development. These activities may include:

**Research Collaboration:** teams may collaborate on the joint research projects, share data, methodologies, and findings, and work together to address common research questions or challenges. Field work is eligible but must be clarified.

**Inhouse Training and/or Workshops:** The host organization may invite the visiting team to participate (as speaker and/or participant) in dedicated workshops, seminars, or training sessions. These opportunities allow researchers to exchange expertise, learn new techniques or methodologies, and enhance their professional skills, with particular benefits for younger team members.

**Note:** These grants are not directly intended for participation in external seminars or workshops. However, if the host organization arranges training sessions, events, or conferences on-site that directly benefit the research project and the Ukrainian or European teams involved, these activities may be eligible for grant support. The grants cover travel and accommodation costs only and do not support any event participation fees.

**Joint Experiments:** teams could engage in joint experimentation using the partners' facilities/instruments/services/archives, enabling teams to work together on their joint research, experiments or studies, leveraging each other's expertise and resources. Field work is eligible but must be clarified.

**Joint Data Analysis and Interpretation:** teams could collaborate on data analysis tasks allows scientists to combine datasets, analyse complex data, develop common standardization strategies and gain new insights into their research areas.

**Publication and Dissemination initiatives:** teams can collaborate on scientific papers, presentations, reports, or conferences to disseminate research findings to a broader audience and increase the visibility of their joint research. **Note:** These grants are not directly intended for participation in external seminars or workshops. However, if the teams are invited to external conferences or events to present their collaboration within EURIZON and the relative joint research project, funding may be considered (the grants cannot cover event participation fees but may cover only travel and accommodation costs).

**Further activities:** in addition to the aforementioned activities, the staff exchange program can incorporate any further initiatives outlined in the "research project description document" submitted as part of the application to the "remote research grants" program by the awarded Ukrainian teams (e.g. Field work is eligible but must be clarified). New activities can be accepted but need to be relevant and duly justified.

Overall, the staff exchanges shall serve as valuable opportunities for scientists to share knowledge, collaborate on their joint research endeavours, and contribute to the advancement of science and innovation between Ukraine and Europe. They can provide opportunities for scientists to establish and strengthen professional relationships, foster interdisciplinary collaborations, and build networks within their respective fields.

*NB: When filling the Visit Form template make sure the activities selected are the same as in the in the online registration form (Indico portal).*

#### 4- Staff exchange rules

- ❖ It is suggested that staff exchanges should mainly **occur at the affiliated institute** of the **European partner**. For European partners traveling to Ukraine, in case the safety conditions will allow, exchanges should be hosted mainly by the affiliated institutes of the **Ukrainian team**. Exceptions, like for field work, can be eligible but must be thoroughly justified.
- ❖ The **maximum refundable budget per team is €4.500**, including travel, accommodation, local transportation and support for subsistence expenses for all traveling team members (European or Ukrainian teams). Specific refund rules and conditions apply (Section 5 of this document). Any expenses exceeding this budget must be covered by the traveling teams from their own resources.
- ❖ **Eligible Expenses:** only expenses specified in these guidelines—covering accommodation, travel, and support for subsistence—are eligible for reimbursement for the traveling Ukrainian teams or their European partners.
- ❖ **Delegation Composition:** we recommend that delegations consist of at least two team members to maximize the program's impact. We strongly encourage prioritizing young scientists and women team members as the primary beneficiaries.

- ❖ **Multiple Visits:** multiple visits are permitted within the same budget allocation per team. In such cases, consider allowing different team members to participate in the exchanges to enhance inclusivity and broaden the program's benefits. And mention clearly all activities in the Visit Plan.
- ❖ The **number of scientists participating in the staff exchange and the duration of the visits** will be determined by the Ukrainian team's Principal Investigator (PI) in consultation with European partners, the traveling delegation, and respective home institutes. These decisions will be based on the available budget and the objectives of the visit;
- ❖ **The type of activities** planned for the staff exchange should include the activities mentioned in section 3 of this document;
- ❖ **Refund rules:** travel, accommodation, local transportation and subsistence will be refunded based on DESY<sup>2</sup> (Deutsches Elektronen-Synchrotron DESY) **rules and procedures** (more info in section 5).
- ❖ The staff exchange programme should **take place within March 31<sup>st</sup>, 2025**, and the report and refund documents must be submitted **within 15 calendar days** following the visit and in any case by April 10<sup>th</sup> 2025 **at the latest**. Exceptions are possible but need to be duly justified in advance.
- ❖ For delegations traveling from Ukraine to Europe the following conditions apply:
  - Each delegation must ensure that its nominated members are authorized to travel outside Ukraine;
  - We recommend teams to prioritize young researchers and women researchers, ensuring they have the necessary permissions to travel abroad according to Ukrainian authorities' guidance. DESY can provide support letters if required;
  - If travel includes flights, and if assistance is needed, DESY travel department can help with the booking of the flight (but must be contacted well in advance departure);
- ❖ For delegations traveling from Europe to Ukraine the following conditions apply: all visitors must ensure that they have authorization from their home institute to travel to Ukraine.

## 4.1- Application process

**APPLICATION STEPS:** The application process consists of four steps:

1. Submission of the Preliminary Visit Plan by the PI;
2. Validation by the EURIZON team;
3. Submission of the Final Visit Plan by the PI;
4. After the travel: reports and refund;

Valid Preliminary Visit plans from selected teams must include all compulsory items mentioned below and **must be submitted (in English) by the Principal Investigator** on behalf of the delegation team **ONLY through the portal** ("Registration" <https://indico.desy.de/event/46663/>). The deadline for submission of the **preliminary plan** is **December 12<sup>th</sup>, 2024, at 12:00 PM (noon) CEST**. Early submissions are highly encouraged especially for travels taking place in the coming weeks.

**STEP 1 - SUBMISSION of the PRELIMINARY VISIT PLAN** (for validation):

- ❖ **The template must be submitted for preliminary validation by the PI before the deadline.**  
The Preliminary Visit Plan describes the delegation team, the purpose of the visit, the

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<sup>2</sup> Official travel at DESY is eligible for reimbursement in accordance with the provisions of the Federal Travel Expenses Act (BRKG) and the Foreign Travel Expenses Ordinance (ARV).

expected impact, and the collaboration foreseen with the European partners (the form is available on the indico page: <https://indico.desy.de/event/46663/>). To be valid it must be signed by the Principal investigator. It will include a preliminary programme of the visit, the preliminary financial plan, the preferred dates, the location of the destination, while on the online registration form will include the name and contacts of the European partner (please make sure European partners are duly informed and give authorization). For the Preliminary visit plan you only have to calculate a rough total amount of expenses for the whole team, just an estimation.

- ❖ The template must be uploaded in English **within December 12<sup>th</sup>, 2024** at 12h00 CET through the portal <https://indico.desy.de/event/46663/>. Early submission is highly encouraged.

## STEP 2 - VALIDATION

The EURIZON Secretariat will check that the eligibility criteria, and the preliminary financial plan, timeline and activities are in line with the programme and will validate the visit or will come back to the team for clarifications. Once approved the Preliminary Plan, the PI can proceed with STEP 3.

**STEP 3 - SUBMISSION of the FINAL VISIT PLAN** (for staff exchange confirmation): Once the preliminary visit plan is validated by the EURIZON Secretariat, the PI must provide the documents mentioned below on behalf of the traveling team **up to 2 weeks before the travel starts** (and 3 weeks if assistance in booking the flight from DESY travel department is needed). Early submission is greatly appreciated, especially in case that clarifications/support letters are needed.

Documents to be included:

- Copy of the passport for each traveling team member;
- Bank account details for each traveling team member (for refund);
- Final financial plan with estimated costs;
- Final agenda of the visit;
- Final travel plan;
- Acceptance statement from the PI and the traveling delegation;
- Acceptance statement from the European partner.

Failure to submit these documents may result in the EURIZON Secretariat postponing or cancelling the staff exchange.

Please note that:

- ❖ If there are **substantial changes** between the preliminary travel plan and the final travel plan, EURIZON Secretariat must be duly informed asap.
- ❖ **The staff exchange programme should take place within March 31<sup>st</sup>, 2025.** Exceptions are possible but need to be duly justified in the application form. Please follow also refund rules (Section 5) and note that EURIZON project will finish officially on April 30<sup>th</sup>, 2025, no activity can be carried out after that date.
- ❖ Visitors are expected to **arrive/depart as close as possible to the beginning/end dates** of the planned visit programme. Arrival on the day before and departure on the day after the scheduled agenda of the programme are acceptable. Due to extended travel times resulting from the situation in Ukraine, DESY can also reimburse transportation and accommodation costs for up to 2 days before and 2 days after the official visit, in addition to the days of the agenda of the staff exchange. All travel days need to be **detailed and included in the travel plan**. *Exceptions are possible but need to be duly justified in advance.*

EURIZON Secretariat **will approve the plan** or contact the PI for questions and clarifications. **Only after EURIZON Secretariat greenlight the SE can officially start.**

#### STEP 4 - After the travel: REPORTS and REFUND

Further documents to be submitted **AFTER THE VISIT in order to obtain refund:**

- ❖ **Travel Expenses Summary (template) and receipts:** the template and the list of travel expenses per each visitor and a scanned copy of all supporting documents/receipts for the refund of the expenses, as described in section 5 of this document, have to be submitted within 15 days from the end of the visit (and in any case within April 10th, 2025) for obtaining the refund. Visitors must submit to the EURIZON Secretariat **the template and the scanned copy of all original documentation** for reimbursement: e.g. a **SCANNED COPY of the flight receipts (and of the boarding pass), train tickets, bus tickets and hotel/guesthouse receipts/invoices**. The template will be available on the indico portal.
- ❖ **Staff Exchange FINAL REPORT**, the document summarizing the staff exchange activities and outcomes, including pictures of the participants and signature of the European host (scanned copy). The template will be available on the indico portal.

The documents for the refund must be uploaded together with the final report of the visit in the portal **no later than 15 calendar days** after the official visit termination (and in any case within **April 10<sup>th</sup>, 2025**).

Failure to meet this deadline may delay or prevent EURIZON from reimbursing travel expenses.

## 5- Regulations for the refund of the staff exchange costs

This is a brief summary of the rules and procedures on how to claim travel and subsistence costs incurred within the frame of the Staff exchange programme. Please always observe the **principle of economy for the teams' travel**.

The documents and final report need to be submitted via the portal **within 15 days after the end of the visit** (and in any case within April 10<sup>th</sup>, 2025).

EU funding, up to the maximum budget available, will be allocated to travel, accommodation and subsistence support to the staff exchange delegations, according to the criteria below mentioned.

#### VISIT PLANNING:

- ❖ EURIZON reimburses expenses based on the original receipts (a scanned copy of all documents needs to be submitted) and up to **€4.500 per team**;
- ❖ The duration of the visit and the number of visitors can be determined by the teams based on the destination and the planned activities; however, the reimbursable budget for each team will not exceed €4.500.
- ❖ DESY will only reimburse the costs of accommodation, transportation and daily allowances for preliminary authorized delegations and only for the days (travel included) agreed with EURIZON Secretariat included in the travel plan. Please make sure to include all traveling days.
- ❖ **TRAVELS and Transportation:** please always observe the principle of economy for your official travel. You should choose the possible lowest-cost travel alternative. For flights: Economy class + 1 baggage allowance per each traveller. For other means of transportation (bus tickets, trains tickets, etc.) please save all original receipts because you will need to send the scanned copy as travel proofs.
  - Costs of **rented cars** can be reimbursed if their use is necessary for conduct of the business trip. That is the case for example if you have to transport bulky objects, or if the destination of the business trip cannot be reached by public transport, insofar as using a taxi would be more expensive. Appropriate reasons must be indicated in order for these costs to be

reimbursed. Please note that if you rent a car, the necessary insurance has to be taken out for this. For example, accident insurance for occupants is not eligible for reimbursement.

- **Use of a taxi** can be reimbursed if it is necessary for local transportation (e.g. from airport to EU facility) and to conduct the official visit. That is the case for example if there is no public transport to the location of the official visit, or if a meeting is extended such that you would not be in time to catch your return flight if you used public transport. If you use a taxi before 6:00 hours or after 23:00 hours, there is no need to give reasons for using a taxi. Otherwise, reasons must be given. If the reasons cannot be accepted, you will still receive reimbursement of 20 euro-cents per kilometre travelled.
- **Use of a private car:** For this you will receive 20 cents per kilometre driven, but not more than EUR 150. However, in the event of an accident, you will be liable for possible damage to exactly the same extent as for private use of the car. A higher reimbursement rate (30 cents per kilometre) is possible for trips by private car. But that is subject to considerable interest (the reason must be indicated in the travel application) and approved by EURIZON Secretariat.

❖ **Accommodation Guidelines**

1-If the **hosting institute offers on-site accommodation** (e.g. a guesthouse), this option is preferred and should be prioritized.

2-If on-site solutions are unavailable, you may look at the documents “Hotel list” available on the indico page. You will find the listing hotels in various locations that have agreed to special conditions with the German Federal Government. These hotels can be booked using the designated booking codes provided in the table. One document covers hotels in Germany, while the other lists hotels in other countries.

3- It is suggested also to also ask the hosting institute if they can provide suggestions for alternative accommodation options, such as hotels or apartments with pre-agreed prices. If this is not possible, then you can book accommodation in hotels or apartments independently. If you choose this option, please note that there is a **reimbursement limit per person per night**, detailed in the table titled “Lumpsum and Accommodation” available on the portal. These limits vary by country and, in some cases, by specific cities (e.g., Geneva, Rome, Krakow).

These limits do not apply if you book hotels that are on the “Hotel list” documents provided. When booking accommodation at these suggested hotels: (i) Use the provided booking code; (ii) Confirm that the mentioned price and conditions apply before finalizing your reservation.

This ensures compliance with the reimbursement rules and helps facilitate a smooth accommodation process for your travel.

- ❖ **Per diem allowance:** All travellers will receive a pre-defined per diem allowance to cover subsistence expenses, including meals. The daily allowance rates depend on the destination country and, in some cases, the specific city (e.g., Geneva, Rome). These rates are detailed in the document titled “Lumpsum and Accommodation” available on the portal.

The full per diem amount applies to full travel days. However, the allowance might be adjusted/reduced—for instance, if the travel is only for half day and /or if the hotel provides breakfast or other meals as part of the booking. The rules are automatically applied by DESY travel department.

**FOR REFUND:**

Please note that the final cost calculations, particularly at a detailed level, are inherently complex and managed **exclusively by the DESY Travel Department**. This is due to the very specific regulations and bureaucratic requirements that must be adhered to.

For this reason, when preparing the **Preliminary Visit Plan**, we only ask for a rough estimation of the costs to be covered. The precise calculations will be completed and finalized by the DESY Travel Department at a later stage.

If you have any questions or require clarification, please **keep them for the Final Plan stage** and send them to the EURIZON Secretariat. We will ensure that your query is forwarded to the DESY Travel department for resolution.

The expenses documents and final report need to be submitted via the portal **within 15 days after the end of the visit** (and in any case within April 10<sup>th</sup>, 2025).

- ❖ **Staff exchange FINAL REPORT:** At the end of the visit, the delegation must submit a Final Staff exchange report, that needs to be signed by the members of the traveling delegation and by the European Host (scanned copy). The report will include the official agenda, will describe the activities conducted and will include pictures of the visits. The Template will be available on the indico portal.
- ❖ **Travel expenses summary:** Visitors must provide the **List of incurred expenses** per each traveller and the **proof of travel expenses** (scanned copy of ticket invoices/receipts and boarding passes, train and bus tickets, and accommodation receipts) incurred during the outward and return journeys. Visitors are expected to arrive/depart as close as possible to the beginning/end dates of the planned visit programme. Arrival on the day before and departure on the day after the scheduled agenda of the programme are acceptable and will be reimbursed. Due to extended travel times resulting from the situation in Ukraine, DESY can also reimburse transportation and accommodation costs for up to 2 days before and 2 days after the official visit, in addition to the days of the agenda of the staff exchange. These travel days need to be **included in the travel plan**.
- ❖ If the traveller combines the staff exchange visit with a **private/non-related trip**, he/she will have to pay the additional costs caused by the trip, e.g. for public transport, meals, overnight accommodation, etc. In this case for the flight/train ticket, if the price is significantly higher than the expected date of departure/return, the traveller can be required to cover the difference.

For all information and clarification needed please contact: [staff-exchange@eurizon-project.eu](mailto:staff-exchange@eurizon-project.eu) mentioning the ID of your research project (as provided by EURIZON).

## 6 –Acknowledgments and research integrity

For all communication relating to the Staff exchange programme and for any dissemination of results of EURIZON research grants, such as through publications, posters, conference papers, etc. the selected Ukrainian teams and their European partners **are required to ensure the visibility of the EU and EURIZON emblems, and to acknowledge the funding** by including the following text, unless agreed otherwise:

*“This project has received funding through the EURIZON project, which is funded by the European Union under grant agreement No.871072.”*

**NB:** Neither the EURIZON Secretariat nor DESY can be held liable for any misconduct by the visiting delegations. Visitors are strongly encouraged to familiarize themselves with the rules of the hosting facility and to adhere strictly to all entry and conduct regulations.