



# **Annual Work Programme**

## **2013**

Adopted by the EIT Governing Board on 13 December 2012

## Table of contents

1. INTRODUCTION .....	7
2. OBJECTIVES AND PRIORITIES FOR 2013 .....	7
2.1. Main features / general objectives .....	7
3. GRANTS .....	10
3.1. Grant awarded without a call for proposals.....	10
3.2. Call for proposals .....	11
4. PROCUREMENT .....	12

## **1. Introduction**

The EIT's 2013 Annual Work Programme (AWP) contains implementing measures for the year in line with the priorities and strategic objectives defined in the Triennial Work Programme (TWP 2013-2015 released following Governing Board adoption on 30 April 2012). The 2013 AWP comprises the objectives given in Regulation (EC) No 294/2008 of the European Parliament and of the Council of 11 March 2008 establishing the Institute, the budget breakdown and main actions as follows:

- EIT's objectives and priorities for the year 2013 (section 2. below);
- Grants to be awarded in 2013 and basic information on the new call for KICs (section 3.);
- Procurements to be awarded in 2013 (section 4.);
- Indicative list of procurements and grants (Appendix 1);
- Methodology for lump sums and flat rate financing (Appendix 2).

The Annual Work Programme is a public document and is available from the EIT's website in English.

## **2. Objectives and priorities for 2013**

### **2.1. Main features / general objectives**

As defined under Regulation (EC) No 294/2008 of the European Parliament and of the Council of 11 March 2008 establishing the European Institute of Innovation and Technology, the EIT's strategic objective is to contribute to the development of the European Union and the Member States' innovation capacity, by integrating the Knowledge Triangle (higher education, research and innovation) activities at the highest world-class standards. In so doing, the EIT fosters strategic networking and cooperation through long term commitment and synergies at European level.

This Annual Work Programme outlines the priorities, objectives, projects and activities planned by the EIT for 2013 with a focus on preparing for the implementation of the provisions of the EIT's Strategic Innovation Agenda (SIA) and subsequent Triennial Work Programmes. To this end, the 2013 Annual Work Programme has been developed on the basis of currently available input, i.e. the European Commission proposal for the EIT's first SIA and the amended EIT Regulation and the package for Framework Programme for Research and Innovation - Horizon 2020 currently under discussion by the European Parliament and Council. As an integral part of Horizon 2020 as of 2014, the EIT's activities will blend overall EU policy objectives. Already to date, the current three KICs complement existing EU policies and initiatives in their respective thematic areas of climate change mitigation and adaptation (Climate KIC), next generation ICT (EIT ICT Labs), and sustainable energy (KIC Innoenergy).

The scaled up EIT which is envisaged by the proposal for a Regulation of the European of Parliament and the Council,<sup>1</sup> will be characterised by mature operations and a larger portfolio of KICs consistent with its ambition to become a role model within the EU innovation policy landscape. Consequently, the EIT's objectives and priorities for this period are to consolidate and synergise its operations and to prepare for achieving the priorities set out in the Strategic Innovation Agenda (2014-2020) in line with the ambitions set for the Triennial Work Programme 2013-2015, in particular, to:

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<sup>1</sup> COM(2011)817, 30.11.2011

- Prepare the selection of the next wave of KICs;
- Consolidate the three existing Knowledge and Innovation Communities (KICs) fostering their growth, impact and sustainability;
- Foster EIT's impact via knowledge sharing, dissemination, outreach and global exposure.

In this context, the EIT will implement the following activities:

### **Priority 1: Prepare the selection of the next wave of KICs**

#### *Objective No 1: Ready to launch the call for future KICs*

The EIT will gradually expand its portfolio of KICs. It is likely that in the period 2014-2020, six new KICs will be set up in two waves for further enhanced impact and to incentivise innovation in new areas of societal challenges. Consequently, in 2013 EIT will:

- a. prepare the new call for selection and designation of KICs, including selection criteria and evaluation process ;
- b. establish a framework of guidance to assist all those interested in presenting a proposal, to help applicants understand both the objectives and the measures of the call for KICs and therefore the types of activities that can (or cannot) be supported;
- c. organise thematic seminars tailored to the future KIC themes, as well as Info Days and Awareness Days presentations to promote the call for the selection and designation of new KICs across all Member States of the European Union;
- d. secure availability of an integrated IT platform for the selection and designation of KICs and integrate this platform into the EIT IT Master Plan;
- e. ensure sufficient time for applicants to respond to the call.

### **Priority 2: Consolidate the three existing Knowledge and Innovation Communities (KICs) fostering their growth, impact and sustainability**

#### *Objective No 2: Strengthened Risk Assurance and EIT-KIC Accountability:*

Simplification, implemented in a responsible and accountable manner coupled with higher levels of risk management and assurance is a must for the EIT to achieve effective results, promote innovation breakthroughs and ensure the involvement of the business community. To this end, in 2013 EIT will:

- a. establish a sound and solid results-oriented monitoring/simplification system capable of ensuring full accountability of the EIT and the KICs and the quality of the deliverables whilst allowing for sufficient flexibility in the KICs' business dynamics;
- b. strive to adapt, improve and streamline EIT's monitoring agenda, reporting and funding processes and constantly seek accountable but innovative approaches that can help the KICs cope with new, emerging needs and enhance their impact;
- c. strengthen support to EIT-KIC partnerships and KIC operations by intensifying oversight of EIT-KIC Legal Entity (LE) interfaces, and that of KIC LE with its CLCs and partners;
- d. develop EIT's simplification agenda in key areas such as contractual agreements, proper reporting, lumps sums and flat rates through KICs' experimentation and EIT experience;
- e. implement continuous and robust systems of monitoring by the EIT of its KICs including higher levels of assurance in terms of performance and financing of their activities.

Objective No 3: Deepening and widening the KICs' activities:

The EIT will actively support the existing three KICs to further elaborate their current initiatives and add new activities to their portfolios, broaden their partnerships and scale up their operations as compared to the initial set-up phase in the period 2010-2012. The EIT will:

- a. consolidate the EIT's competitive review mechanisms for the allocation of an increasing percentage of the KICs grant, which will take into account that KICs grow at different rates, their particular dynamics but comparative performance;
- b. strengthen and refine existing collaboration mechanisms to further boost EIT/KIC impact in education, entrepreneurship and world-class innovation;
- c. promote the EIT-labelled degrees, proper qualitative indicators and encourage KICs to develop a greater variety of educational and training activities;
- d. leverage cross-KIC activities and the exploration of Knowledge Triangle synergies, cross-cutting issues within and across KICs and their co-location centres;
- e. develop a EIT sponsored platform for the collection of data, information and knowledge sharing related to KICs activities, role models and learnings.

**Priority 3: Enhance EIT's impact via knowledge sharing, dissemination, outreach and global international exposure**

Objective No 4: Reinforcing dissemination of good practices and innovation models.

The EIT will actively promote the dissemination of good practices for the integration of the knowledge triangle in order to develop a common innovation and knowledge sharing culture. By identifying, analysing and sharing good practices, as well as new governance and funding models emerging from the KICs, the EIT will ensure that knowledge generated within the EIT and its KICs is disseminated and capitalised upon for the benefit of people and institutions, including those not directly participating in the KICs. The EIT needs not only to codify learnings but also in making them transferable to areas in which innovation capacity is weak it needs to create offerings and 'spaces' to facilitate adoption of experience gained by the EIT and its KICs. The EIT will, amongst others:

- a. carry out comprehensive stakeholder analysis to establish the 'EIT Stakeholder Forum', as foreseen in the EIT's SIA;
- b. establish a scheme ('EIT fellows') allowing high talent people from across the EU and beyond to get involved in the activities of the EIT, its KIC and their co-location centres for a limited period of time;
- c. develop a concept for the set-up of the EIT alumni community in order to support a functional and strong network of graduates from EIT/KIC educational and training activities ('EIT alumni') as well as EIT's stakeholder community overall;
- d. develop with the support of experts a longer term strategy for education, entrepreneurship and innovation based on the main conclusions from the work of the KICs and analysis of the on-going experience of KICs and CLCs;
- e. start preparations for a repository/platform of open courseware from the EIT's and KICs' educational and training activities to make lessons learned and successes from KICs systematically accessible to the wider EU innovation community and beyond; thereby providing the basis of evidence-based 'thought leadership' for the EIT as a think tank.

### 3. Grants

#### 3.1. Grant awarded without a call for proposals

**Basic act:** Regulation (EC) No 294/2008 of the European Parliament and of the Council of 11 March 2008 establishing the European Institute of Innovation and Technology.

Article 190(1)(c),(d),(f) of the Rules of Application for the authorisation of award grants without a call for proposals to bodies identified by the basic act

**Budget line:** 3000 KIC grants

**Priorities of the year, objectives to be fulfilled and expected results:**

The Business Plans for 2013 grants must include initiatives that specifically contribute to fostering the following strategic objectives, which are derived from the EIT Scoreboard identified by the Governing Board, and have been used as criteria for the external expert evaluations recruited by the EIT:

1. integration of the knowledge triangle within KIC's priority themes;
2. quality and novelty of the KIC education plans, with a particular focus on EIT labelled degree programmes;
3. quality and novelty of the plans for innovative research, leading to the creation of new products, services and business models;
4. quality and novelty of the business creation and entrepreneurship plans;
5. quality of dissemination of good practices and outreach across the European.

**Award criteria:** The specific criteria have been defined by the Governing Board in 2012 as follows:

1. KIC Past Performance
2. Proposed KIC Business Plan and indicative Budget
3. Outcome of the Hearing with the EIT Governing Board;

**Indicative amount of direct award:** EUR 128 865 709 in line with Article 190 (1) d of the Rules of Application

**Maximum possible rate of co-financing:** up to 100% of KIC Added Value expenditure may be financed for each KIC.

**Methodology used for lump sum and flat rate financing:** explained in appendix 2.

**Specific grant agreement:** The action is implemented through a specific grant agreement within the meaning of Article 75, paragraph 4 of the EIT Financial Rules. Three Framework Partnership Agreements were concluded as follows:

1. Framework partnership agreement with the Knowledge and Innovation Community Stichting Climate KIC, signed on 16 February 2011.
2. Framework partnership agreement with the Knowledge and Innovation Community EIT ICT Labs IVZW, signed on 13 December 2010.
3. Framework partnership agreement with the Knowledge and Innovation Community KIC InnoEnergy SE, signed on 17 December 2010.

### **3.2. Call for proposals**

**Basic act:** Proposal for a Regulation of the European Parliament and of the Council amending Regulation (EC) No 294/2008 of the European Parliament and of the Council of 11 March 2008 establishing the European Institute of Innovation and Technology.<sup>2</sup>

As provided under point 2.1.2. of the proposal for a decision of the European Parliament and the Council on the Strategic Innovation Agenda of the EIT<sup>3</sup>, a Framework of Guidance and associated documents will also be published by the EIT to assist all those interested in presenting a proposal. It will help them understand both the objectives and the measures of the call for selection and designation of new KICs and therefore the types of activities that can (or cannot) be supported. It will also aim to give detailed information on what is needed to apply and what level of grant can be offered. Finally, it will offer an explanation of the selection procedure and of general rules relevant to those applications for EU grants that are selected at the end of this procedure.

#### **Objectives to be fulfilled and expected results:**

The aim of the call is to select and designate the next wave of the KICs to contribute to the EIT strategic objectives proposed in the SIA. The SIA proposes 6 new KICs. For 2014/2015, the thematic areas for the new KICs are being discussed by the European Parliament and Council. The decision will be based on which themes have the greatest potential to add value to existing activities and bring about a real boost to innovation, thereby reflecting expectations by European citizens and States.

#### **Timetable of the call for the selection and designation of new KICs**

The publication will take place during the fourth quarter of 2013 subject to the adoption of the Basic Act referred to above and the Regulation of the European Parliament and of the Council establishing Horizon 2020 – The Framework Programme for Research and Innovation (2014-2020). The evaluation process and designation of the new KICs may be accomplished by the end of 2014/2015.

#### **Eligibility criteria**

The eligibility criteria of the new KICs are defined in Article 7 of the EIT Regulation and the Proposal for a Regulation of the European Parliament and of the Council amending Regulation (EC) No 294/2008.

#### **Selection criteria**

The selection criteria will be decided by the EIT Governing Board's in 2013. The criteria will be based on the overarching principles defined in the Article 7 of the EIT Regulation and the Proposal for a Regulation of the European Parliament and of the Council amending Regulation (EC) No 294/2008. Proposals will be ranked according to the results of the evaluation carried out by independent experts.

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<sup>2</sup> COM(2011)817, 30.11.2011

<sup>3</sup> COM(2011)822, 30.11.2011

## 4. Procurement

The overall budgetary allocation reserved for procurement contracts in 2013 amounts to EUR 6 549 998. Procurement is used to implement both administrative appropriations (Title 2 and part of Title 1) and operational appropriations (from Title 3).

The administrative appropriations concern the implementation of EIT operations under its administrative autonomy<sup>4</sup>. Under Title 1 - staff expenditure, the EIT foresees launching procurement procedures for an indicative amount of EUR 546 100, while an indicative amount of EUR 1 304 798 is planned for Title 2 - infrastructure and operating expenditure.

Operational appropriations cover the implementation of actions contributing to the achievement of the objectives of the EIT referred to under point 2.1. of the EIT 2013 Work Programme. The indicative amount of procurement procedures linked to operational activities amounts to EUR 4 699 100.

A detailed table, as set out in appendix 1, provides an estimation per budget lines of the number and type of contracts envisaged, as well as the subject and the procedural timeframe. The amounts indicated account for the estimated annual value of the contracts for the year 2013, which differs from the total value in case of multiannual contracts.

The type of procurement procedures to be launched is dependant on the subject matter and volume:

- Low value negotiated procedures will be used mostly at the beginning of the year to respond to the very immediate and low budgeted needs.
- Open call for tenders, mostly as from the second half of the year, aimed at concluding framework contracts provide for the following EIT needs over a 4-year period: Audio-visual and IT equipment; Knowledge management; Travel agency and events organisation; Studies (such as feasibility, monitoring studies, project evaluation, analysis), experts and consultancy services; EIT branding, external communication, dissemination and outreach activities.
- High value negotiated procedures will be used for the conclusion of four-year framework contracts for the provision of services listed in annex II B of Directive 2004/18/EC. Two procedures are foreseen and will be given adequate publicity: (1) External legal advice, which will be appropriately advertised (as required by Article 134 of the Rules of Application, use of a negotiated procedure without prior publication of a contract notice) by ex-ante and ex-post publication in the EIT website; (2) medical services, for which a contract notice will be published in the OJ (as required by Article 135 of the Rules of Application, use of a negotiated procedure after prior publication of a contract notice).

In addition to the above procedures, procurement includes the use of existing framework contracts of the EIT and of other EU Institutions, Bodies and Agencies and new contracts as results of future joint procurement procedures and the selection of experts from the European Commission's and other EU bodies' databases<sup>[1]</sup>.

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<sup>4</sup> According to Article 60 (4) of EIT Financial Rules "administrative appropriations may be implemented without prior financing decision.

<sup>[1]</sup> Article 74b (3) of EIT Financial Rules



## Appendix 1 – Indicative list of grants and procurements in 2013

Objective index	Budget heading	Budget	Mode of implementation	Indicative type of contract(s)	Subject of the contract in generic terms	Indicative number of contract(s)	Indicative timeframe for launching the procurement procedures
<b>Administrative appropriations (without prior financing decision)</b>							
	Title 1 and Title 2 Administrative expenditure	1 850 898	PROC				
	Title 1 Administrative expenditure	4 607 635	ADMIN				
	<b>Sub-total Title 1 and 2</b>	<b>6 458 533</b>					
<b>Operational appropriations (with prior financing decision)</b>							
	<b>Title 3 - Operational expenditure</b>						
	3000 KIC grants	128 865 709	GRANT	N/A	N/A	N/A	N/A
1,2,3	3110 KIC monitoring and performance measurement	1 095 000	PROC	SER, EXP, SC	IT service, consultancy, event organisation	12-15	Q1-Q4
2,4	3120 Entrepreneurship activities	380 000	PROC	SC	event organisation	8-10	Q1-Q3
2,4	3130 Educational activities	135 000	PROC	SER, SC	event organisation, editing, promotion	5-7	Q1-Q3
	3140 EIT Foundation	0	PROC				
1,2,4	3150 Experts	275 000	PROC	EXP	concept development, business plan assessment, call documents preparation	5-10	Q1-Q3
1,2	3151 Legal assistance	100 000	PROC	SC	legal advice related to grant agreements	3-6	Q1-Q4
1,2,3,4	3190 Other KIC related activities	510 100	PROC	SER, EXP, SC	event organisation, IT service, production of materilas, editing,	7-10	Q1-Q4
1,2,4	3200 Communication tools	570 000	PROC	SC	communication campaign, website development, production of publications	6-10	Q1-Q4
4	3201 Media affairs	60 000	PROC	SER	media monitoring, dissemination of information	1	Q1-Q2
4	3202 Communication strategy and corporate identity	210 000	PROC	SUP, SC, SER	promotional material, corporate brochure, strategy development	3-5	Q1-Q3
1,2,4	3203 EIT brand events, conferences	1 069 000	PROC	SC	event organisation	25-30	Q1-Q4
1,4	3209 Other	30 000	PROC	SC	communication training	1	Q3-Q4
4	3300 Strategy development	240 000	PROC	SER, SC	event organisation, study	3-5	Q1-Q4
4	3301 Stakeholder relations	25 000	PROC	SC	event organisation	3-5	Q1-Q4
	<b>Sub-total Title 3</b>	<b>133 564 809</b>					
	<b>TOTAL</b>	<b>140 023 342</b>					

**<<Type of contract>>:**

SER: Direct service contract  
 SUP: Direct supply contract  
 PO: Purchase order  
 SC: Specific contract following a framework contract  
 EXP: Expert contract  
 SLA: Service Level Agreement  
 ADMIN: Administrative

**<<Mode of implementation>>:**

PROC: Procurement procedure  
 ADMIN: Administrative expenditure  
 GRANT: Grant agreements

## **Appendix 2 – Methodology for lump sum and flat rate financing**

### **LUMP SUMS AND FLAT-RATE FINANCING AUTHORISED FOR 2013 FOR THE KICS' USE IN THE CONTEXT OF ANNUAL EIT- KICS GRANT AGREEMENTS**

The KIC LE and KIC partners may declare their costs on KIC added-value activities based on lump sums and flat rates for unit costs according to the following sections. Declaring costs using lump sums and flat rates excludes the reimbursement of costs actually incurred for the same cost item.<sup>5</sup>

Persons with special needs may benefit from specific financing measures. A person with special needs is defined as a potential participant whose individual physical, mental or health-related situation is such that his/her participation in the activities would not be possible without extra financial support. The additional grant towards both subsistence and travel costs will be assessed case-by case and based on real costs incurred. In such case, the grant may provide for the subsistence and travel costs of an accompanying person if justified. The individual situation should be described and the particular needs and extra costs attached to it should be detailed in the application for special needs costs to the EIT. Based on these explanations, and the availability of funding, the EIT will then judge whether extra support can be granted.

#### **1. Funding of Masters and doctoral courses**

Costs of the course management, scholarships or fellowships, and also participation costs (for doctoral courses) and scholar grants (for masters) will be eligible for KIC partners when they are delivered by KIC partners. A course is considered to be delivered by KIC partners when the degree awarding institutions are members of a KIC (not necessarily the same KIC).

Scholarships are applicable for students, PhD candidates, postgraduates and other KIC partners. There are two types of scholarships: full scholarships (covering all necessary costs of the individuals during their study period), and financial contributions (covering certain costs while the students are following their studies, such as mobility actions). These two types of scholarships are mutually exclusive for a same student per academic year (i.e. a person receiving a full scholarship cannot receive any other financial contribution from the EIT budget under any circumstances).

Taking into account the EIT labelled degree concept developed by the EIT and the KICs, which requires for its implementation a more demanding set of activities ensuring effective training of students and PhD candidates on the knowledge triangle relevant skills, EIT labelled degrees will be eligible for a higher "Maximum amount", as specified below. In order for a degree to be eligible for the higher EIT labelled degrees amounts, the EIT label must have been awarded with enough guarantees of having been awarded as a result of an open, fair and transparent process, according to the EIT QALE model handbook<sup>6</sup>.

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<sup>5</sup> According to Article 111, paragraph 4 of the Financial Regulations, under no circumstances shall the same costs be financed twice by the budget.

<sup>6</sup> Decision of the GB decision of the EIT 00251.EIT.2012.GB of 28 June 2012 on the EIT Quality Assurance and Learning Enhancement Model Handbook

### a. Masters

The financial contribution to the internal management costs, full scholarships, and scholar grants will be the following:

**Table IV.1:** lump sums and flat rates for master courses

Categories of cost	Amounts	
	<i>master degrees (either EIT labelled and non-labelled degrees)</i>	
	<i>Calculation</i>	<i>Maximum amount</i>
<b><i>Costs related to course management (for 12 months)</i></b>		
Course management of non-joint, multiple or double degree	--	€ 10000/year
Course management for joint, multiple or double-degree	€ 15000 flat rate per participating HEI/year	€ 35000/year
<b><i>Costs related to grants</i></b>		
Full student scholarship (per month)	--	€ 2000 per month
Teacher grants	€ 1200/2 weeks flat rate, min. 2 weeks and max. 3 months	€ 14000 per year and teacher

Similarly to the Erasmus Mundus programme 2009-2013 guide, the following definitions apply:

- Joint degree - a single diploma issued by at least two higher education institutions offering an integrated programme and recognised officially in the countries where the degree-awarding institutions are located;
- Double or Multiple Degree - two or more national diplomas issued by two or more higher education institutions and recognised officially in the countries where the degree-awarding institutions are located.
- Participating HEI - an establishment providing higher education and recognized by a competent national authority of a European country, and which acts as degree-awarding organisation in the context of the master
- Teachers will be eligible for master grants only when they are members of the staff of a participating HEI. In case of non-academic institutions recognised as a formal partner of the master (i.e. that play a decisive role in the management and implementation of the project cooperation activities), staff from those will also be eligible.

It should be noted that:

- "Full scholarships" cover all necessary costs of the student during his/her study period. To avoid double financing (prohibited by Article 111 FR), a student awarded with a full scholarship cannot benefit from any further costs such as for individual mobility. No teacher can be awarded a scholarship for more than 3 months per year (i.e. up to 6 scholarships of 2 weeks).

For more details on the rules on the application of these lump sums /flat rates please consult the "Programme Guide for Erasmus Mundus 2009-2013" available at:

[http://eacea.ec.europa.eu/erasmus\\_mundus/programme/programme\\_guide\\_en.php](http://eacea.ec.europa.eu/erasmus_mundus/programme/programme_guide_en.php)

## b. Doctoral courses

The financial contribution to the internal management costs, full fellowships, and career training activities will be the following:

**Table IV.2:** lump sums and flat rates for PhD courses

Categories of cost	Amounts	
	<i>PhD programmes (labelled and non-labelled ones)</i>	
	<i>Calculation</i>	<i>Maximum amount</i>
<b><i>Costs related to course management (for 12 months)</i></b>		
Course management of non-joint, multiple or double degree	--	€ 5000/year
Course management for joint, multiple or double degree	€ 15000 flat rate per participating HEI /year + € 5000 for the coordinator/year	€ 50000/year
<b><i>Costs related to fellowships</i></b>		
Full fellowship with "employment contract" <sup>7</sup> (per month)	--	€ 3167* per month
Full fellowship without "employment contract" (per month)	--	€ 1583* per month
<b><i>Costs related to career training activities</i></b>		
Participation costs in career training activities	--	€ 1800 per month

\* Figures for Correction coefficient index 100. Rates for individual countries are obtained by applying to these rates the correction coefficients for cost of living, as referred in Table IV.9 under Annex I.

In the same way as for masters, the following Erasmus Mundus programme 2009-2013 guide definitions apply:

- Joint degree - a single diploma issued by at least two higher education institutions offering an integrated programme and recognised officially in the countries where the degree-awarding institutions are located;
- Double or Multiple Degree - two or more national diplomas issued by two or more higher education institutions and recognised officially in the countries where the degree-awarding institutions are located;
- Participating HEI - an establishment providing higher education and recognized by a competent national authority of a European country, and which acts as degree-awarding organisation in the context of the doctoral programme. For the context of flat rates, HEI includes also doctoral/graduate/research schools and research organisations on the condition

<sup>7</sup> Similarly as for Erasmus Mundus and Marie Curie EU programmes, "Employment contracts" refer to the doctoral candidates' recruitment method that guarantees adequate and equitable social security provisions (including sickness and parental benefits, health and accident insurance, pension rights and unemployment benefits) in accordance with existing national legislation and with national or sectorial collective bargaining agreements. Provided these conditions are met, KICs can opt for the most suitable enrolment framework.

that they provide doctoral training and research activities, and deliver doctorate degrees recognised as such by KIC eligible countries authorities of the country concerned.

As a general rule, and in line with the principles defined in the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers, KIC partners must recruit their PhD fellowship holders under "employment contracts" except in adequately documented cases (where national regulation would prohibit this possibility). If such a contract cannot be awarded (this will have to be duly justified), KIC partners may opt for another approach compatible with national legislation and the necessary social security coverage for the fellowship holders.

In the same way as for the masters, it should be noted that "full fellowships" cover all necessary costs of the PhD candidate during his/her doctoral education period, and therefore a PhD candidate awarded with a full fellowship cannot receive any further costs such as for mobility (see section 2 in this Annex).

For more details on the rules on the application of these lump sums /flat rates please consult the "*The People Work Programme 2012*" available at: [http://cordis.europa.eu/fp7/wp-2012\\_en.html](http://cordis.europa.eu/fp7/wp-2012_en.html)

## **2. Individual mobility grants**

For all mobility actions, the contribution to subsistence costs will be calculated as an overall amount on the basis of the duration of stay. Subsistence costs cover accommodation, meals, local travel, the cost of telecommunications, including fax and Internet, as well as other sundries.

### **a. Student, trainee and staff mobility grants**

For mobility actions with a duration of up to and including 12 weeks, travel and subsistence costs are reimbursed on the basis of real costs. For mobility actions with a duration of longer than 12 weeks, the lump sum constitutes an overall amount considered to include also travel costs. The principle of proportionality justifies the approach of including travel costs for mobility actions of duration longer than 12 weeks, as the contribution towards the travel costs represents only a minor part compared to the global amount for subsistence. This is justified by the shorter duration of the stay, where the grant amount is calculated as a pro rata of the monthly rate.

The following flat rates and lump sums featured in the aforementioned programme are eligible to be used under the GA 2013 (the rates below do not include travel costs which can be (partially) reimbursed based on real cost):

**Table IV.3:** Subsistence - Maximum rates (in EUR) per host country

Host country		Monthly rate
Belgique/Belgie	BE	640
Bulgarija	BG	401
Česká republika	CZ	539
Danemark	DK	858
Deutschland	DE	607
Eesti	EE	484
Ellas	EL	607
España	ES	625
France	FR	743
Eire/Ireland	IE	698
Italia	IT	682
Kypros	CY	536
Latvija	LV	476
Lietuva	LT	464
Luxembourg	LU	640
Magyarország	HU	507
Malta	MT	526
Nederland	NL	666
Österreich	AT	680
Polska	PL	493
Portugal	PT	544
România	RO	445
Slovenija	SI	573
Slovensko	SK	512
Suomi/Finland	FI	764
Sverige	SE	759
United Kingdom	UK	860
Island	IS	648
Liechtenstein	LI	939
Norge	NO	939
Schweiz/Suisse/Svizzera	CH	939
Hrvatska	HR	591
Türkiye	TR	525

For mobility destinations outside these countries, a monthly flat rate of € 300 will be applied.

For the case of KIC staff mobility (i.e. staff from the KIC legal entity or from a KIC partner), and based on the Erasmus mobility figures for staff mobility of 2009/10, the lump sum applicable for subsistence will be € 90.5 per full working day. A full working day corresponds to 5 working hours. The maximum duration of staff mobility is 6 weeks. No staff can be awarded a scholarship for more than 6 weeks per year.

For more details on the rules on the application of lump sums/flat rates please consult the "*Official Programme Guide for Lifelong Learning Programme*" available at: [http://ec.europa.eu/education/llp/doc848\\_en.htm](http://ec.europa.eu/education/llp/doc848_en.htm) (Part I – General Provisions).

**b. Mobility actions with outstanding KIC added value component**

In duly justified cases, and after the approval of the EIT on a case-by-case basis, some KIC mobility actions will be considered of "outstanding KAVA" allowing KICs to declare higher mobility costs for some of them. KICs concerned will have to present the proposal for approval to the EIT on a case-by-case basis in the context of their Business Plan. The following table describes the lump sums that can be applied to declare costs for mobility actions under these conditions, indicating in each case the minimum and maximum durations:

**Table IV.4:** Subsistence - Maximum rates (in EUR) per host country including travel, for mobility actions with outstanding KAVA

	<b>Amounts</b>	
	<i>calculation</i>	<i>Maximum amount</i>
<b><i>Type of individuals (&amp; purpose of mobility, when relevant)</i></b>		
Trainees (undergraduate and others) – study mobility	€ 1000* per month; Duration: 3-10 months	€ 10000*
Trainees (undergraduate and others) – placement mobility	€ 1158* per month; Duration: 3-10 months	€ 11580*
Master student – study mobility	€ 1000* per month; Duration: 2-12 months	€ 12000*
Master student – placement mobility	€ 1158* per month; Duration: 2-12 months	€ 13896*
Early stage researcher (doctoral student)	€ 1500* per month; Duration: 6-12 months	€ 12000*
Experienced researcher (postdoctoral staff or	€ 1800* per month; Duration: 6-12 months	€ 18000*
KIC Staff (legal entities or partners)	€ 2500* per month; Duration: 1-3 months	€ 7500*

\*Figures for Correction coefficient index 100. Rates for individual countries are obtained by applying to these rates the correction coefficients for cost of living, as referred in Table IV.9 under ANNEX I.

For more details on the rules on the application of these lump sums /flat rates please consult the "*Programme Guide for Erasmus Mundus 2009-2013*" available at: [http://eacea.ec.europa.eu/erasmus\\_mundus/programme/programme\\_guide\\_en.php](http://eacea.ec.europa.eu/erasmus_mundus/programme/programme_guide_en.php) (see Action 2 – Erasmus Mundus Partnerships)

### 3. Organisation of other KIC training activities

The contribution to organisation costs of training activities other than masters and PhD courses will be calculated as an overall amount on the basis of the duration of stay. Organisation costs cover accommodation, meals, local travel, the cost of telecommunications, including fax and Internet, as well as other sundries.

In duly justified cases, and after the approval of the EIT on a case-by-case basis, some KIC training activities will be considered "Outstanding KAVA activities". KICs will be allowed to declare higher costs of these Outstanding KAVA activities. KICs concerned will have to inform the EIT accordingly in the context of their Business Plan. Based on the experience of the Erasmus intensive programmes and the Jean Monnet programme, the following table of flat rates applies:

**Table IV.5:** lump sums and flat rates for organisation of education programmes other than master and PhD courses

Duration of the education programme	Amounts			
	Standard KAVA activities		Outstanding KAVA activities	
	Calculation	Maximum amount	Calculation	Maximum amount
Up to 60 teaching hours (up to 1 full week)	€ 3000* per 5 working days (= 1 full week); proportional to duration if less	€ 3000*	min. teaching hours * teaching cost per hour per country,	€ 10000*
60-240 teaching hours (duration of 1 to 3 weeks, up to 5 CTS)	€ 6000* per 10 working days (= 2 full weeks); proportional to duration if less	€ 5000*	min. teaching hours * teaching cost per hour per country	€ 20000*
5 – 15 ECTS (duration: 1-3 months)	€ 6000* per 10 working days (= 2 full weeks); proportional to duration if less	€ 6000*	€ 6000* per 10 working days (= 2 full weeks); proportional to duration if less	€ 25000*
15-30 ECTS (duration: 3-6 months)	€ 6000* per 10 working days (= 2 full weeks); proportional to duration if less	€ 7000*	€ 6000* per 10 working days (= 2 full weeks); proportional to duration if less	€ 30000*
30-60 ECTS (duration: 6-12 months)	€ 6000* per 10 working days (= 2 full weeks); proportional to duration if less	€ 7500*	€ 6000* per 10 working days (= 2 full weeks); proportional to duration if less	€ 35000*
<b>Additional costs per student (subsistence)</b>			€ 250 / month	€ 1750*

\*Figures for Correction coefficient index 100. Rates for individual countries are obtained by applying to these rates the correction coefficients for cost of living, as referred in Table IV.9 under ANNEX I.



Teaching hour costs could also be covered for outstanding KAVA activities. The cost of a teaching hour per country is specified in the following table:

**Table IV.6:** National teaching cost per hour for teaching modules

<b>EU Member</b>	<b>Teaching cost scales</b>	<b>Other countries</b>	<b>Teaching cost</b>
Austria	200	Antigua and Barbuda	94
Belgium	193	Australia	200
Bulgaria	80	Bahrain	177
Cyprus	148	Barbados	97
Czech Republic	125	Brunei Darussalam	200
Denmark	200	Canada	199
Estonia	100	Croatia	101
Finland	182	Equatorial Guinea	102
France	180	Hong Kong, China	200
Germany	196	Iceland	177
Greece	151	Israel	143
Hungary	98	Japan	176
Ireland	176	Korea Republic	145
Italy	166	Kuwait	200
Latvia	87	Libya	87
Lithuania	89	New Zealand	140
Luxembourg	200	Norway	200
Malta	120	Oman	129
Netherlands	200	Russian Federation	97
Poland	98	Saudi Arabia	127
Portugal	121	Seychelles	89
Romania	80	Singapore	200
Slovakia	114	Switzerland	200
Slovenia	139	Trinidad and Tobago	133
Spain	167	United States	200
Sweden	200		
United Kingdom	198	<b>All other countries</b>	80

For more details on the rules on the application of lump sums/flat rates please consult the "*Official Programme Guide for Lifelong Learning Programme*" available at: [http://ec.europa.eu/education/llp/doc848\\_en.htm](http://ec.europa.eu/education/llp/doc848_en.htm)

(Part I – General Provisions; for Table IV.5 see *ERASMUS Intensive Programmes* and for Table IV.6 see *Jean Monnet Chairs*).

#### **4. Staff costs and costs of external participants**

In duly justified cases, and after the approval of the EIT on a case-by-case basis, KICs will be allowed to declare staff costs as well as the costs of external participants for the organisation of actions not adequately covered by the previous sections. These activities can involve education as well as entrepreneurship or business innovation.

The cost of staff assigned to the action by KIC partners or KIC legal entities comprises actual salaries plus social security charges and other statutory costs included in the remuneration. The staff costs and the costs of external participants will have to be justified by the applicant. Costs must be broken down into categories 1 to 4 (i.e. Manager, Researcher/Teacher/Trainer, Technical, Administrative) of the International Standard Classification of Occupations (ISCO).

If declared staff costs exceed the maximum rates indicated in the following table, the surplus will be considered as ineligible.

**Table IV.8:** Maximum eligible daily rates (in EUR) for Staff costs and costs of external participants

Country			Manager	Researcher Teacher	Technic	Administrati
Belgique/Belgie	BE	Belgium	460	360	240	214
Bulgaria	BG	Bulgaria	40	26	22	15
Česká republika	CZ	Czech Republic	134	88	72	53
Danemark	DK	Denmark	361	284	236	197
Deutschland	DE	Germany	419	310	221	203
Eesti	EE	Estonia	102	73	59	42
Ellas	EL	Greece	279	218	142	118
España	ES	Spain	321	212	163	117
France	FR	France	435	351	257	193
Fire	IE	Ireland	309	328	239	178
Italia	IT	Italy	454	298	200	174
Kypros	CY	Cyprus	316	217	142	96
Latvija	LV	Latvia	78	63	50	38
Lietuva	LT	Lithuania	75	55	42	34
Luxembourg	LU	Luxembourg	496	331	282	197
Magyarország	HU	Hungary	107	79	57	44
Malta	MT	Malta	119	99	74	58
Nederland	NL	Netherlands	305	262	212	170
Österreich	AT	Austria	449	302	244	194
Polska	PL	Poland	109	77	51	39
Portugal	PT	Portugal	258	181	122	77
Romania	RO	Romania	84	51	34	28
Slovenia	SI	Slovenia	240	161	109	89
Slovenská republika	SK	Slovakia	95	54	45	34
Suomi /Finland	FI	Finland	368	255	196	163
Sverige	SE	Sweden	360	256	226	176
United Kingdom	GB	United Kingdom	355	334	231	153
Island	IS	Iceland	338	219	193	151
Liechtenstein	LI	Liechtenstein	449	302	244	194
Norge	NO	Norway	440	345	311	239
Hrvatska	HR	Croatia	141	102	66	49
Schweiz / Suisse	CH	Switzerland	478	354	252	232
Türkiye	TR	Turkey	86	60	42	36

For any other country (e.g. other non-EU Member States), the following maximum amounts apply:

- Category 1 – Managers (maximum amount EUR 450/day)
- Category 2 – Researchers/University professors /Trainers (maximum amount EUR 300/day)
- Category 3 – Technical (maximum amount EUR 250/day)
- Category 4 – Administrative (maximum amount EUR 125/day)

For more details on the rules on the application of lump sums/flat rates please consult the "*Official Programme Guide for Lifelong Learning Programme*" available at: [http://ec.europa.eu/education/llp/doc848\\_en.htm](http://ec.europa.eu/education/llp/doc848_en.htm) (Part I – General Provisions).

**ANNEX IV.2: Table IV.9** Correction Coefficients per country

**a) The 27 EU Member States**

Austria	106.2
Belgium**	100
Bulgaria	62.7
Cyprus	83.7
Czech Republic	84.2
Denmark*	134.1
Estonia	75.6
Finland	119.4
France	116.1
Germany	94.8
Greece	94.8
Hungary	79.2
Ireland	109.1
Italy	106.6

Latvia	74.3
Lithuania	72.5
Luxembourg**	100
Malta	82.2
Netherlands	104.1
Poland	77.1
Portugal	85
Romania	69.5
Slovak Rep.	80
Slovenia	89.6
Spain	97.7
Sweden	118.6
UK	134.4

\* The rate for Denmark also applies for The Faroes

\*\* Belgium and Luxembourg are the basis of the correction coefficient which is therefore always static at 100.0

**b) The non-EU Countries and New Caledonia (French overseas territory)**

Albania***	66.7
Algeria***	69.4
Angola****	108.5
Argentina***	59
Armenia****	69
Australia ***	99.5
Azerbaijan**	94
Bangladesh	45.4
Barbados****	104.9
Belarus****	64.3
Benin	92.9
Bermuda	151.5
Bolivia	49.5
Bosnia&Herzegovina**	68.1
Botswana*	47.9
Brazil	95.5
Burkina Faso	96.5
Cambodia***	71.7
Cameroon**	98.2
Canada	78.9
Cape Verde	74.4
Cen African Rep.	113.1
Chad***	114.6
Chile**	59

China**	94.8
Colombia**	76.9
Congo****	116.2
Costa Rica*	83.1
Côte d'Ivoire	99.9
Croatia****	81.8
Cuba****	76.6
Dem Rep Congo***	118.8
Djibouti	85.4
Dominican Rep.*	63.2
Ecuador*	68.3
Egypt****	54.2
El Salvador	63.6
Eritrea****	90.9
Ethiopia***	78.4
Fiji****	62.7
FYROM***	60.6
Gabon	110.4
Gambia****	75.7
Gaza Strip	103.1
Georgia****	76.8
Ghana****	65.1
Guatemala****	73
Guinea****	70.4

Guinea-Bissau***	98.3
Guyana	53.5
Haiti****	94.3
Honduras	60.3
Hong Kong	83.4
Iceland***	79.9
India***	55.8
Indonesia****	74.8
Israel***	96.4
Jamaica****	93.5
Japan	105
Jordan	70
Kazakhstan****	85.1
Kenya**	75.9
Kosovo***	58.5
Kyrgyzstan****	76.3
Laos****	87.1
Lebanon***	73.5
Lesotho**	47.7
Liberia***	92.5
Libya***	57.6
Liechtenstein**	109.9
Madagascar****	73.9
Malawi****	81.8
Malaysia***	65
Mali****	97.1
Mauritania	61.2
Mauritius	72.6
Mexico**	65.3
Moldova****	60.5
Montenegro***	64.6
Morocco**	78.3
Mozambique****	71
Namibia*	58
Nepal***	68.6
New Caledonia****	112.5
New Zealand****	90.9
Nicaragua***	56.3
Niger***	90.4
Nigeria***	89.7
Norway****	130.7
Pakistan****	46.8
Panama	52.2
Papua New Guinea**	89.2

Paraguay****	65.2
Peru	67.4
Philippines****	75.6
Russia***	93.6
Rwanda	82.7
Samoa	79.9
Saudi Arabia****	76.2
Senegal	88.1
Serbia***	74
Sierra Leone****	107.8
Singapore	95.8
Solomon Islands****	90.7
South Africa**	48
South Korea****	106.5
Sri Lanka***	69.9
Sudan****	79
Surinam****	58.7
Swaziland*	48.7
Switzerland**	109.9
Syria**	82.4
Taiwan	77.3
Tajikistan***	58.3
Tanzania***	67.9
Thailand****	79.1
The Faroes	134.1
East Timor****	85.1
Togo	87
Tonga	85
Trinidad & Tobago****	78.4
Tunisia	68.7
Turkey****	97.7
Uganda***	69.2
Ukraine* **	64.5
Uzbekistan**	51.8
US**	101.3
Uruguay	72.1
Vanuatu	105.6
Venezuela****	69.2
Vietnam***	43.6
West Bank	103.1
Yemen****	67.7
Zambia****	77.1

\* These correction coefficients are the weightings applicable in third countries as per Articles 12 and 13 of Annex X to the Staff Regulations published in IA N°71-2009 27/11/2009

\*\* These correction coefficients are the weightings applicable in third countries as per Articles 12 and 13 of Annex X to the Staff Regulations published in IA N°18-2010 10/03/2010

\*\*\* These correction coefficients are the weightings applicable in third countries as per Council Regulation (EC) No 790/2010 of 15 December 2010 (OJ L336 of 21.12.2010, p.50)

## **Definitions and Glossary**

**Bachelor student / undergraduate (student in first cycle)** - a person enrolled in a first cycle higher education programme and who will obtain after the completion of the programme a first higher education degree.

**Coordinator / coordinating organisation or a programme:** The coordinator is the leader in the coordinating organisation. He/she acts as contact person for the master/PhD programme in all aspects related to the management of the course. The coordinating organisation is the organisation responsible for the overall management of the master/PhD in the partnership, consortium or network.

**Co-tutelle** – joint supervision of doctoral studies by two universities from different countries; if successful, the doctoral candidate will be awarded a joint or double doctoral degree awarded by the two institutions.

**Diploma Supplement** – The Diploma Supplement model was developed by the European Commission, Council of Europe and UNESCO/CEPES. The purpose of the supplement is to provide sufficient independent data to improve the international „transparency“ and fair academic and professional recognition of qualifications (diplomas, degrees, certificates etc.). It is designed to provide a description of the nature, level, context, content and status of the studies that were pursued and successfully completed by the individual named on the original qualification to which this supplement is appended. It should be free from any value judgements, equivalence statements or suggestions about recognition. ([http://ec.europa.eu/education/lifelong-learning-policy/doc1239\\_en.htm](http://ec.europa.eu/education/lifelong-learning-policy/doc1239_en.htm))

**Dissemination** – a planned process of disseminating information on the activities, outputs and results of programmes and projects to key actors and target groups. It occurs as and when the results of programmes and initiatives become available.

**Doctoral candidate (candidate in third cycle)** – an early-stage researcher at the beginning of his/her research career, starting at the date of obtaining the degree which would formally entitle him/her to embark on a doctoral programme.

**Doctoral programme (third cycle)** – a research-related programme of higher education study and research that follows a higher education degree and leads to a fully recognised doctorate degree, offered by higher education institutions or, in those Member States where this is in accordance with national legislation and practice, by a research organisation.

**Doctoral school** – a research and pedagogical structure that groups and coordinates several research teams in the context of a coherent research project and organises and/or provides training activities for doctoral candidates and prepares them to their professional career.

**Double or Multiple Degree** - two or more national diplomas issued by two or more higher education institutions and recognised officially in the countries where the degree-awarding institutions are located.

**Employment Contracts:** similarly as in the Erasmus Mundus "Action 1B – Joint Doctoral Programmes", "Employment contracts" refer to the doctoral candidates' recruitment method that guarantees adequate and equitable social security provisions (including sickness and parental benefits, health and accident insurance, pension rights and unemployment benefits) in accordance with existing national legislation and with national or sectoral collective bargaining agreements. Provided these conditions are met, KIC partners can opt for the most suitable enrolment framework.

**EURAXESS** – a portal containing useful information on the management of research activities as well as the recruitment of researchers; more information is available at: <http://ec.europa.eu/euraxess/>.

**European Credit Transfer System (ECTS)** – a student-centred system aimed at facilitating students' mobility between different HEIs and based on the student workload required to achieve the objectives of a programme, objectives preferably specified in terms of the learning outcomes and competences to be acquired. More information is available at:  
[http://ec.europa.eu/education/lifelong-learning-policy/doc48\\_en.htm](http://ec.europa.eu/education/lifelong-learning-policy/doc48_en.htm).

**Enterprise** – all undertakings engaged in economic activity in the public and private sector, whatever their size, legal status or the economic sector in which they operate, including the social economy.

**European Qualification Framework (EQF)** – acts as a translation device to make national qualifications more readable across Europe, promoting workers' and learners' mobility between countries and facilitating their lifelong learning; more information is available at:  
[http://ec.europa.eu/education/lifelong-learning-policy/doc44\\_en.htm](http://ec.europa.eu/education/lifelong-learning-policy/doc44_en.htm).

**Exploitation of results** consists of "mainstreaming" and "multiplication". Mainstreaming is the planned process of transferring the successful results of programmes and initiatives to appropriate decision makers in regulated local, regional, national and European systems. Multiplication is the planned process of convincing individual end-users to adopt and/or apply the results of programmes and initiatives.

**Full Partner** – any organisation which acts as a full member of a consortium, partnership or project network delivering the master of PhD programme. In contrast with "associated partners" (see definition above), full partners can benefit from the EU grant and – in close cooperation with the beneficiary – play a decisive role in the management and implementation of the project cooperation activities.

**Higher education** – all types of courses of study, or sets of courses of study, training or training for research at the post-secondary level which are recognized by the relevant national authorities of a participating country as belonging to its higher education system.

**Higher Education Institution (HEI)** – an establishment providing higher education and recognized by the competent national authority of a participating country as belonging to its system of higher education; for the purposes of Action 1 B - Joint Doctoral programmes, the concept of HEI includes also doctoral/graduate/research schools and research organisations on the condition that they provide doctoral training and research activities, and deliver doctorate degrees recognised as such by the relevant authorities of the country concerned.

**Higher education staff** – persons who, through their duties, are involved directly in the educational and/or administrative process related to higher education.

**Joint degree** – a single diploma issued by at least two higher education institutions offering an integrated programme and recognised officially in the countries where the degree-awarding institutions are located; in accordance with the Erasmus Mundus Programme Decision, “programmes resulting in the award of joint degrees shall be promoted”.

**Marie Curie Initial Training Network** – a European Commission-funded programme aimed to improve early-stage researchers' career prospects in both the public and private sectors, thereby making research careers more attractive to young people; more information can be obtained from [http://cordis.europa.eu/fp7/people/initial-training\\_en.html](http://cordis.europa.eu/fp7/people/initial-training_en.html).

**Masters programme (second cycle)** – a second cycle higher education programme that follows a first degree or equivalent level of learning and that leads to a masters degree offered by a higher education institution and recognised as such by the relevant authorities of the country where the master degree is delivered.

**Masters student (student in second cycle)** – a person enrolled in a second cycle higher education programme and who has already obtained a first higher education degree or has a recognised equivalent level of learning according to national legislation and practices.

**Memorandum of Understanding:** a document that describes all the agreements reached between the partners delivering a master or PhD programme with regard to all aspects related to the management of the partnerships and organisation of the mobility. It outlines the role and responsibility of the partners within the organisation concerning mobility activities, the procedure and criteria for the selection of candidates and the measures foreseen to tackle specific programme objectives such as recognition, quality assurance, prevention of brain drain and sustainability. It must also contain specific provisions in terms of financial management of the grant.

**Mobility** – moving physically to another country, in order to undertake study, work experience, research, other learning or teaching or research activity or related administrative activity, supported as appropriate by preparation in the host language.

**Post-doctoral Programme** – higher education study or research offered by a higher education institution or a research organisation established in accordance with national legislation and practice that follows a doctoral degree.

**Promotion and awareness raising** is used primarily in the context of publicising the existence of programmes and initiatives, their aims, objectives and activities and the availability of funding for given purposes.

**Post-doctoral Researcher** – an experienced researcher who is in possession of a doctoral degree or who has at least three years of full-time equivalent research experience, including the period of research training, at a research organisation established in accordance with national legislation and practice after obtaining the degree which formally allowed him/her to embark on a doctoral programme offered by higher education institution.

**Scholar / academic / teacher** – a person with outstanding academic and/or professional experience who lectures or conducts research in a higher education institution or a research organisation established in accordance with national legislation and practice.

**Student Agreement** – an agreement signed by the consortium and student enrolled in masters and PhDs explicitly indicating any academic, financial and administrative modalities related to the student's participation in the course and, if applicable, the award and usage of the scholarship.