# EOSC Secretariat Co-creation Funding Opportunities
## Guide for applicants
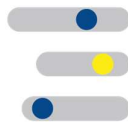
Setup and management of the EOSC Secretariat

supporting the EOSC Governance

2nd Version, 9th July 2020

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# 1. European Open Science Cloud

The European Open Science Cloud (EOSC) fosters open science and the digital transformation of science by providing a trusted and open virtual environment for the scientific community with seamless access to services addressing the whole research data life cycle. Focus is on user-orientation and inclusiveness across borders and disciplines, whilst the governance should be characterised by a minimal set of rules of participation.

According to definitions, co-creation is a process of a product-service development that is focusing on customer experience and interactive relationships. It is "an active, creative and social process, based on collaboration between producers and users that is initiated by the firm to generate value for customers." (London Research and Consulting, 2017).

The EOSC Secretariat responds to this clear plea for stakeholder engagement by introducing the Co-creation approach and a budget for its realisation.

# 2. Co-creation budget funding opportunities

EOSCSecretariat.eu retains a high degree of flexibility in its roll-out plan by adopting a co-creation approach and providing budget for all upcoming, foreseen and unforeseen, activities and actions related to the work and strategic objectives of EOSC implementation.

The EOSC fosters open science by providing a trusted and open virtual environment for the scientific community with seamless access to services addressing the whole research data life cycle. The EOSC will be built on a community driven approach. Integrating the EOSC stakeholders is key in its process. Do you have an idea that will help co-create the EOSC? Have the chance to get fund for your activity!

## 2.1 Three ways to apply for Co-creation's funding

### 2.1.1 Study Proposals
Studies help the EOSC Working Groups, the Executive Board and the EOSC Secretariat carry out informed decisions and activities that will help co-create the EOSC.

### 2.1.2 Projects and Activities
Do you have an idea for an activity or mini-project that will help us co-create the EOSC? Share your idea now and have the chance for budget to be allotted for your activity!

### 2.1.3 Open Calls
Open calls are periodically launched by the EOSC Secretariat in order to fund activities and actions through the adoption of a co-creation approach.

> ### Engagement with WGs
> We want to inspire the WGs to send in proposals that are more to the point with their current work and go beyond activities like events and workshops and travel support.
> Learn more: https://eoscsecretariat.eu/eosc-working-groups

## 2.2    What kinds of activities may be requested for co-creation activities?

Activities and actions which are related to the work of the EOSC Secretariat to support the EOSC Governance (EOSC Executive Board, Governance Board, Stakeholder Forum), specifically within the context of the activities of the Working Groups of the Executive Board, which are:

- Engaging with Stakeholders/ Coordination (initiatives)
- Support services for the Working Groups (WGs)
- Analysis and studies to support EOSC in practice
- Support services - EOSC Board and Executive Board
- Communication, Dissemination, Stakeholder forum/events

# 3. Eligibility criteria

All submitted proposals must adhere to FAIR[1], Openness principles and have their results and goals focused on supporting the development and shaping EOSC.

Below we will present the eligibility criteria related to the applicant's profile, eligible countries, what are the eligible costs and more.

## 3.2 Eligible applicants

The Co-creation funding opportunity is open to individuals or natural persons and/or legal entities, either on an individual basis or as a consortium residing in the Member States of the European Union (EU), including their outermost regions and the associated countries (AC).

Applicants may be legal entities or natural persons. In addition, the following condition apply:

- The organisations or individuals applying should have not have convictions for fraudulent behaviour, other financial irregularities, unethical or illegal business practices.
- The participating organisations should not have been declared bankrupt or have initiated bankruptcy procedures.
- Applicants who are not receiving support from other instruments (EU or national Research Infrastructure projects) for the proposed activities, and are not being funded from other sources for an identical activity

## 3.3 Eligible countries

Applicants should be registered (for organisations) or resident (for individuals) in the Member States of the European Union[2] (EU), including their outermost regions[3] and the Associated country[4] (AC).

## 3.4 Eligible costs

In order to be eligible, actual costs must be:

- Actually incurred by the beneficiary, i.e.: Real and not estimated, budgeted or imputed and; Definitively and genuinely borne by the beneficiary (not by any other entity)
- Entered as eligible costs in the request form. The eligible costs cannot include costs that did not appear in the estimated budget.
- Neither subcontracting nor overheads are accepted.
- Incurred for and/or during the action duration. The 'action duration' is the period running from the action starting date to the end date of the action and may not go beyond 31st March 2021, as the EOSCSecretariat.eu project itself will end in 2021.
- Connected to the action (i.e. necessary to achieve the action's objectives)
- Identifiable and verifiable (i.e. come directly from the beneficiary's accounts (be directly reconcilable with them) and supported by documentation). The beneficiaries must be able to show the actual costs, i.e. what was actually paid for the work

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[1] https://ec.europa.eu/info/sites/info/files/turning_fair_into_reality_0.pdf
[2] https://europa.eu/european-union/about-eu/countries_en#tab-0-0
[3] https://ec.europa.eu/regional_policy/en/policy/themes/outermost-regions/
[4] https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/3cpart/h2020-hi-list-ac_en.pdf

- Reasonable, justified and must comply with the principles of sound financial management, in particular regarding economy and efficiency. 'Economy' means minimizing the costs of resources used for an activity (input), while maximizing quality; 'efficiency' is the relationship between outputs and the resources used to produce them.

Note: In order to respect the rules on funding set by the European Commission, the EOSC Secretariat will fund initiatives related to EOSC for an amount of 45.000 EUR max.

### 3.4.1 Accommodation and travel policies for requests

To submit proposals related to the realization of the study, a co-creation activity/project and/or participate in an open call, you must use this cost parameter related to travel and accommodation. Per Diem is not applicable.

- 1-night stay per person up to €650;
- 2-nights stay per person up to €850;
- 3-nights stay per person up to €1050, etc.

| Cost | Claimable |
|---|---|
| Hotel cost | Where accommodation is not provided actual cost will be reimbursed up to 150 euros per night including breakfast. |
| Air travel | All air travel should be Economy Class flights, maximum of €500 |
| Rail travel | All rail travel should be second class rail, maximum of €500 |
| Travel by car | 0,22 EUR / kilometre |
| Local travel | Most efficient and reasonably priced method of travel between point of arrival (airport, train station), hotel and venue. |
| Travel Insurance | Actual cost up to a limit of 20 euros for 6 days travel. |
| Lunch | If not provided. Actual cost up to a limit of 18 euros per day. |
| Dinner | If not provided. Actual cost up to a limit of 50 euros per day. |
| Travel Visa Fees | May be supported by scans of Visa in passport showing cost. |

## 3.5 English language

English is the official language for EOSC Secretariat funding opportunities. The proposal must be in English in all its mandatory parts in order to be eligible.

English is also the only official language during the whole length of the third-party grant process. This means that all communication will be in English and all deliverables will only be accepted if in English.

## 3.6 Absence of conflict of interest

Applicants shall not have any potential conflict of interest with the EOSC Secretariat selection process.

# 4. Preparation and submission of the proposal

## 4.1 Structure and content of the proposals

Proposals must use the EOSC Secretariat template matching the type of co-creation's funding opportunities existing (Study, Projects/Activities and Open Call).

## A. Project proposal: divided in three main sections

1) **A simple administrative section** (name of applicant, name of organization, contact information and signalise the type of activity).

2) **Overview of the proposal** (for the study proposal and open calls the content needs to be more detailed as requested in the form)

   - Title of activity.
   - Detailed description of the activity.
   - Describe expected benefits to the EOSC/KPIs, outcomes (which should be clear, measurable, and realistic) and how they will generate added-value on help shaping EOSC. Consistency between the objectives, approach and proposed activities.

3) **Budget and value for money**
   Provide a description of expected costs, using the tables provided keeping in mind the overall maximum contribution you are applying for. The following activities or types of expenditure qualify for financial support:

   - Personnel costs;
   - Software licenses (in as much as they are required for the execution of the project);
   - Travel expenses;
   - IPR search, advice or protection services.

The EOSC Secretariat Consortium may ask for further details and explanations about the funding requested.

## A.1. Special section for open call proposals

4) **Expertise and resources (for open calls only)**
   Track record and previous experience of the project team, relevance, technical improvements and value added regarding the specific topics of the call.

   **Overview of the team and allocation of work between team members.** For each partner in the project team, please provide:

   - The role of each participant (partner) in the team, and their specific responsibilities for the proposed activities.
   - A short biography for each of the persons responsible for carrying out the proposed activities.
   - A description of any previous collaborations with other partners in the project team;
   - 3-pages CV and/or other material specified in the call at the EOSCsecrtariat.eu web page.

## B. Annexes: agenda of the event, CVs and references, etc. Any other document that is relevant to understand the proposal, maximum of 5 pages.

Evaluators will be instructed not to consider additional material submitted by an applicant.

## 4.2 Procedure for submitting proposals

Applicants should submit proposals by website of EOSC Secretariat before the deadline (see point 4.3.). Applications submitted by any other means will not be considered.

- Study Proposals: https://www.eoscsecretariat.eu/funding-opportunities/study-suggestion
- Projects/Activities: https://www.eoscsecretariat.eu/funding-opportunities/co-creation-requests
- Open Calls: https://www.eoscsecretariat.eu/funding-opportunities/open-calls

## 4.3 Deadline for submission of proposals

Applicants are recommended not to wait until the last minute to submit the proposal.
Failure to submit on time for any reason, including extraordinary circumstances, will result in the rejection of the proposal.

| Year 2020 at 18:00 CET | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| January | February | March | April | May | Jun | July | August | September | October | November | December |
| 9th | 3rd | 2nd | 2nd | 4th | 1st | 6th | 3rd | 7th | 5th | 2nd | 2nd |

### 4.3.1. Deadline for closure of all proposed activities

All proposals supported with the co-creation resource may not go beyond 31st March 2021, as the EOSCSecretariat.eu project itself will end in 2021.

## 5. Selection Process

Applications will be evaluated every month and we will notify you after approximately 30-45 days.
The evaluation procedure is as follows:
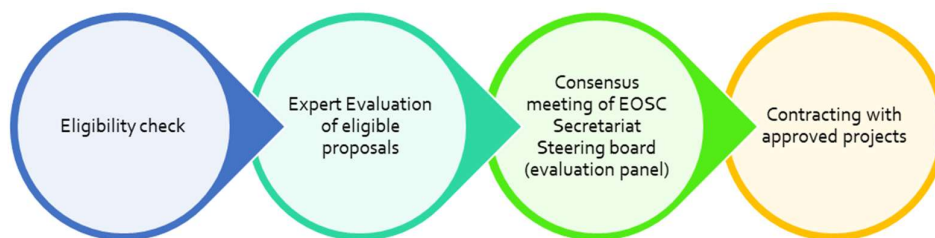


All financial applications will be considered on a case by case basis and on market expectations, so we recommend the applicants provide a transparent and objective analysis of the financial provisioning required. Those applications that clearly respond to how it can pragmatically contribute to EOSC indicating clear benefits/KPIs are encouraged. All applications will be carefully monitored, motivated and justified for project internal, auditing purposes.

Note: In order to respect the rules on funding set by the European Commission, the EOSC Secretariat will fund initiatives related to EOSC for an amount of 45.000 EUR max. The EOSC Secretariat reserves the right of recurring to public tendering procurement, whose rules will strictly be complied to, for any initiative that exceed the aforementioned threshold.

## 5.1 Phase 1: Eligibility check

To be eligible for evaluation, applications will be checked for compliance with the following:

- Comply with all the eligibility criteria listed in Section 3
- Be submitted through the website of EOSC Secretariat (https://www.eoscsecretariat.eu/funding-opportunities) considering that there are 3 way to apply (study, projects/ideas and open calls). Choose the correct form and channel to submit your proposal.
- Be submitted before the deadline (i.e. 4 May 2020 at 18:00 CET). The time recorded by the cocreation@eoscsecretariat.eu email system for the receipt of the email will be the official one.

All applicants eliminated from the process after the eligibility check will be notified in writing by email. Similarly, an email will be sent to all participants passing the eligibility check.

## 5.2 Phase 2: Expert evaluation

All eligible applications will be assessed and scored by EOSC Secretariat experts and members of the Steering Group. During the assessment of the proposals, the EOSC Secretariat will receive support of EOSC WGs and, if applicable, representatives of the EOSC related projects to get endorsement.

Proposals will be judged against the following criteria:

- Contribution on shaping EOSC: deliverables / outcomes of the proposals
- Openness & reuse
- Expertise and excellence of the proposed team
- Project planning and value for money

## 5.3 Phase 3: Consensus meeting of EOSC Secretariat Steering board (evaluation panel)

Following the individual evaluations, a consensus meeting of the EOSC Secretariat steering board will be organised, it will happen one each month until January 2021. During this meeting, a final decision will be agreed and where necessary an additional review of projects for which there was a lack of consensus in terms of scoring by individual evaluators or for which additional clarifications are required will be undertaken.

The EOSC Secretariat steering board will then formally approve a list of projects within the limits of the available funding.

All applicants who have had their proposals examined by the EOSC Secretariat Steering board will be notified in writing by email of the final decision whether the proposal has been successful or not. The registration number of the proposal will be provided in both cases and only for the approved proposals the approved amount money will be indicated.

- List of approved co-creation activities: https://eoscsecretariat.eu/funding-opportunities/list-approved-co-creation-activities

## 5.4 Phase 4: Contracting with approved projects

The next step is to establish a contract between the parties, the applicant and EOSC Secretariat, represented by Technopolis Group Brussels will forward the document to be fulfilled and to be signed.

- **Contact:** Andrea Grisilla - Technopolis Group (cocreation@eoscsecretariat.eu)

# 6. Beneficiary contracting and payment procedure

## 6.1 Responsibilities of Beneficiaries

Beneficiaries are responsible for the proper use of the funding and must ensure that they comply with responsibility for developing what has been proposed towards to the EOSC Secretariat.

The responsibility that must be extended to recipients:

- Avoiding conflicts of interest
- Maintaining confidentiality
- Promoting the action and give visibility to the EU funding
- Liability for damages

## 6.2 Funding

The amount of financial support offered will be determined by the EOSC Secretariat Steering board based on the submitted budget and planned deliverables from a value for money perspective. The proposed budget may be adjusted for costs that are deemed ineligible as well as for the cost of any additional activities recommended by EOSC Secretariat.

Financial support will be paid in instalments against the achievement of milestones as follows:

- 50% after signature of the transfer agreement / contract by both parties;
- 50% after the completion of the project (submission of the final report), upon presentation of the financial report with all the receipts and its approvals.

Please don't forget to send the scan of the receipts to the following e-mail cocreation@eoscsecretariat.eu.

## 6.3 Deadline to deliver the financial report

All the projects will have three months for the submission financial report. We emphasize that the submission of financial reports may not beyond 30st April 2021.

- Financial report form[5].
- Guidance financial report[6].

### 6.3.1. Keeping records

Beneficiaries must keep records and other supporting documentation in order to prove the proper implementation and the costs declared as eligible.

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[5] https://www.eoscsecretariat.eu/file/eoscsecretariatfinancialreporttemplate2020xlsx#overlay-context=
[6] https://www.eoscsecretariat.eu/sites/default/files/eoscsecretariat_guidelines_rendering_financial_report.pdf

# 7. Dissemination of the proposals and results

EOSCsecretariat.eu is in position to support all activities and actions that are beneficial to the uptake and implementation of EOSC at any level, from the stakeholder community to the governance. It is fundamental to promote and support all activities financed with the co-creation budget. We want to reach out to more people and involve the community in the EOSC building process. For this reason, beneficiaries should engage and support in promoting and dissemination your activity, e.g. by giving it visibility on our website.

## 7.1 Four dissemination channels

There are four main dissemination channels structured by the EOSC Secretariat which can be used during all stages of the development of the project. Learn about the main channels and how to use them.

### 7.1.1. EOSCSecretariat.eu Zenodo Community

The aim of this community is to collect and showcase the outcomes and results produced by the EOSCSecretariat.eu project partners in the context of the project. In thein the following, the word document will be used to address any outcome, result, report, produced by the EOSCSecretariat.eu project consortium and beneficiaries. The Community will also host open access reports of co-creation funded activities and studies.

- It will be deposited in the EOSCsecretariat.eu community in Zenodo[7] by us, please send via e-mail cocreation@eoscsecretariat.eu
- Please indicate the authors and their ORCID if they have one.

### 7.1.2. EOSC Liaison Platform.

The EOSC Liaison Platform is an online discussion environment where the EOSC Stakeholders and the EOSC Governance can communicate, exchange documents, collect input and provide feedback. It is an inclusive space, open to the general public interested in EOSC.

- **What you can do?** Start a new discussion; share your surveys and questionnaires; and, have your say on the topics and outputs of the Working Groups.
- Link: https://www.eoscsecretariat.eu/eosc-liaison-platform
- In case you should encounter any issue or bug related to the Liaison Platform or if you need support on its use please contact support@eoscsecretariat.eu
- If you want to suggest the inclusion of other tags to the EOSC Liaison Platform please contact info@eoscsecretariat.eu

### 7.1.3. EOSC Interest Groups

The EOSC Interest groups are virtual spaces used to discuss selected horizontal topics that are considered relevant for the EOSC. Representatives from the EOSC-related projects are invited to participate in the Interest Groups. Each Interest Group is facilitated by at least one member of the EOSCsecretariat.eu

- **What you can do?** Start a new discussion; post any article, findings or key notes of an event/discussion; comment on an existing thread; search among discussions; and, visit the Interest Group repository.
- **Active Interest Groups:** EOSC Researcher engagement and use cases; EOSC Service and Research Product Catalogues; EOSC Federating Core and EOSC Glossary.
- Link: https://www.eoscsecretariat.eu/eosc-interest-groups

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[7] https://zenodo.org/deposit/new?c=eoscsecretariat

- In case you should encounter any issue or bug related to the EOSC Interest Groups or if you need support on its use please contact support@eoscsecretariat.eu
- If you want to suggest the inclusion of other tags to the EOSC Interest Groups please contact info@eoscsecretariat.eu

### 7.1.4. For disseminating news and events

Keep up to date with the latest discussions, developments and events within the EOSC ecosystem.

If your activity is an event, for example, we are happy to receive information on the type of the event (workshop, conference, hackathon etc.), date, location, venue, target audience, objective – and if available – also pictures. Please send this information to: info@eoscsecretariat.eu or https://eoscsecretariat.eu/contact-us

## 7.2 Acknowledgement of EU funding

Any communication or publication of the third parties about the proposal/sub-project and the result arising therefrom shall clearly indicate that the project has received funding from the European Union under the EOSC Secretariat project and must therefore display the EU flag logo on all printed and digital material, including websites and press releases. Moreover, the third parties agree that certain information regarding the projects selected for funding may be used by EOSC Secretariat for communication purposes.

The successful applicant gives the EC irrevocable, transferable and non-exclusive copyrights that arise during execution of the activity

# 8 Support to applicants

For more information, please check EOSC Secretariat website: https://eoscsecretariat.eu/node

For further information on the Co-creation Funding Opportunities or if you have any doubts relating to the eligibility rules or the information that is to be provided in the Application form, please contact the Support Team: cocreation@eoscsecretariat.eu

# 9 Applicable law

The sub-grant agreement will be governed by Belgian law and relevant regulations of the European Union.

# 10 Data protection

Data will be treated confidentially and will not be disclosed to external organisations, other than those acting as evaluators on related projects or for other legitimate reasons.

See here the full Privacy Policy and for the EOSCsecretariat.eu website.

The project is co-funded by the European Commission, therefore the EU data processing law applies. The policy on "protection of individuals with regard to the processing of personal data by the Community institutions" is based on EU regulation as described https://ec.europa.eu/info/legal-notice_en#personal-data-protection