



Deliverable 2.4 EPIMove: Blended Mobility Formats

European Partnership for an Innovative Campus Unifying Regions **EPICUR Research Agenda**Shaping European Society in Transition

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1. Introduction

1.1 Context of the project

EPICUR, the European Partnership for an Innovative Campus Unifying Regions, is a first-generation European University Alliance, dedicated to shaping European Society in Transition through the development of collaborative inter- and transdisciplinary teaching and learning.

EPICUR-Research

The EPICUR-Research project, coordinated by Karlsruhe Institute of Technology, launched in January 2021 and funded by the European Commission's Horizon 2020 programme, is setting up new types of research collaborations at a European level for Early Career Researchers (ECR). EPICUR-Research is primarily aimed at ECR in order to expand their field of research and improve the sharing of skills and knowledge within a European research area on interdisciplinary political and social issues.

Partners of the EPICUR Alliance

- Karlsruhe Institute of Technology "KIT" (Germany)
- University of Strasbourg "Unistra" (France)
- Adam Mickiewicz University in Poznan "AMU" (Poland)
- Aristotle University of Thessaloniki "AUTh" (Greece)
- University of Natural Resources and Life Sciences, Vienna "BOKU" (Austria)
- University of Haute-Alsace "UHA" (France)
- University of Freiburg "ALU-FR" (Germany)
- University of Amsterdam "UvA" (The Netherlands)
- University of Southern Denmark "SDU" (Denmark)1

The main objective of this WP2 EPICommunity as basis for strengthening human capital is to enhance sustainable research careers in the context of the European Research Area. This will be achieved by the creation of an EPICommunity², an inclusive virtual researchers' network which will be supported by necessary instruments and a digital platform.

1.2 Objectives of deliverable D2.4

The main objective of the deliverable is to provide a benchmarking exercise about the different existing mobility formats for researchers of all the members of the EPICUR Alliance, including doctoral candidates all the way to tenured professors, whether they are in-person or virtual.

"Activity 2.2.2: Blended mobility formats (Mo8-M14). Main steps of this activity are the following:

- a) Desk research about research mobility formats (e.g. Marie-Curie Secondments, and Online Learning Agreements, Visiting professors, Lecture Tour, etc.) and new blended mobility instruments in the new Erasmus programme: A collection and description of the current mobility protocols, context and/or frameworks will be done in this step. This step will give input to the design of the new blended (traditional/real & virtual) researcher's mobility format.
- b) Modification of EPICUR virtual mobility formats to researchers' mobility (EPI-Move): Based on the results of the previous step, the experience and the outputs of the EPICUR Erasmus+ project, the virtual and blended mobility formats will be elaborated.

¹ Although SDU is not part of the consortium for the EPICUR-Research project, we are including their data in our work. The University of Southern Denmark (SDU) will officially join the EPICUR Alliance in November 2022.

² EPICommunity: researchers' social network

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c) Provide indicators and test their efficiency among EPICUR partners and other alliances via EPIConnect (WP4).

The outputs of this activity are reported at this deliverable D2.4 including policy recommendations to the European Commission on the needs of early career researchers in the context of blended mobility, with a view to the new instrument in the next Erasmus+ programme as well as future Horizon Europe instruments." (Extract from our grant agreement's Annex I, p. 15)

The mapping exercise of outgoing mobility schemes available for researchers of the EPICUR universities will include those available at the University of Southern Denmark, as well as those mobility formats that stem from the EPICUR Erasmus+ and EPICUR-Research H2020 projects. A general overview of Marie Sklodowska-Curie Actions (MSCA) and other schemes, like Visiting Professor programmes and Hubert Curien Partnerships (PHC) are also given. Finally for this sub-task, EPICUR mobility formats are presented.

Afterwards, a short model is given for EPIMove, a virtual mobility format for EPICUR alliance researchers, including a model agreement (cf. Annex 1). To respond to the third sub-task, a series of indicators are proposed to measure the success of EPIMove. Since EPIConnect (WP4) is still not completed, a group of Work Package 2 and mobility experts gathered on 9 June 2022 to discuss the relevancy and foreseen efficiency of these indicators. Policy recommendations to both partner universities and the European Commission are given immediately afterwards.

1.3 Definition of 'mobility'

Mobility has already been defined within the context of the EPICUR university alliance. In EPICUR's Erasmus+ pilot phase, the SIG-Mobility group's mid-term report on mobility carries the following definitions:

Mobility: refers to a period of time a student or member of staff spends at a partner university

- **Physical:** refers to students and staff in higher education at another institution to study or teach for a limited time by physically leaving their home.
- Virtual: refers to a set of activities supported by Information and Communication Technologies, including e-learning, that realise or facilitate international, collaborative experiences in a context of teaching, training or learning.
- **Blended:** refers to courses which use a combination of traditional face-to-face teaching workshops or seminars; and distance learning techniques online.
- KA 103: the Erasmus instrument for mobility.
- Regional: mobility taking place within a regional network (e.g. EUCOR).
- National: mobility taking place within a national network (e.g. UFA).

Although not all of these terms are useful for the purposes of this deliverable, several of them are, and these definitions will be kept in mind throughout the rest of the deliverable.

Furthermore, further context on mobility within EPICUR has also been given and agreed by the alliance's Steering Committee:

"Student, researcher and staff mobility can happen by the mobility of the universities' ecosystem"

• EPICUR mobilities are flexible, hybrid, dynamic, inclusive and green

³ Researchers are considered to be included in this definition too, for the purposes of EPIMove.

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• EPICUR mobilities can occur at any moment in time, as long as the student or staff is enrolled at one of the EPICUR partner universities

- EPICUR mobilities span the entire set of flexible and rolling mobilities ranging from single courses to modules, co-curricular activities and semester exchanges
- EPICUR mobilities for students constitute an equivalent of at least 3 ECTS or (future) microcredentials or badges
- EPICUR mobilities can result in issuing certifications, such as micro-credentials and/or badges for researchers and staff
- EPICUR mobilities are offered by a host outside of the home institution (note: local funding guidelines apply for potential funding opportunities)

These definitions inspire this deliverable's work and its proposal to create EPIMove, a dedicated mobility format for researchers within the EPICUR alliance.

2. Mapping of mobility formats available at partner universities

To facilitate the use of the resources by ECRs, different schemes have been divided by home institution, rather than by type of mobility. Rather than harmonising the information into a single format, mobility schemes for each institution are presented following the same format in which each partner university presents them. This will be subject to a policy recommendation at the end of the deliverable.

2.1 Karlsruhe Institute of Technology

The Karlsruhe House of Young Scientists (KHYS) coordinates mobility schemes for ECRs working at KIT. PhD students and post-doctoral researchers may benefit from the following internal funding schemes:

- The **Research Travel Grant**⁴ for PhD students and postdocs: KIT supports travel and living expenses for a three to six-month research stay at a university or company abroad. The stay abroad should be an extension of the ECR's research work and not constitute a fundamental component thereof.
- The Remote Collaboration Program⁵ for PhD students and postdocs: Since opportunities for international scientific exchange are still limited due to the global pandemic, KHYS has created a flexible tool to realize smaller projects to network internationally independently of current travel restrictions. The aim of the program is to enable young scientists to build up and strengthen research networks with universities, industry companies, and other organizations from abroad. Funding within the Remote Collaboration Program can for example cover costs for trainers for moderated digital network meetings, the exchange and shipment of samples, the commissioning of measurements at a collaboration partner, software for networking, or salaries for a student or research assistant in the context of the collaboration. The measures applied for must support remote collaboration (e. g. travel costs to visit a collaboration partner will not be covered). The funding can cover one or several of the above-mentioned activities or any other costs that would benefit the collaboration and that are billable according to the usual institutional and budgetary provisions.
- The **Networking Grant**⁶ enables PhD students to travel abroad for up to two weeks to visit a researcher or working group renowned in their area of expertise and in relation to their research project. Candidates can split the funding and visit up to two contacts (each for maximum two

⁴ https://www.khys.kit.edu/english/research_travel_grant_doc.php

⁵ https://www.khys.kit.edu/remote_collaboration_program.php

⁶ https://www.khys.kit.edu/networking_grant.php

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weeks). The main condition is that the contact must be a new one for the candidate and their research group. Especially those applicants, who have not had the chance to gain international experience yet, will benefit most of this program and the accompanying workshop.

• The flexible and modular funding scheme **Connecting Young Scientists** (ConYS)⁷ enables postdoctoral researchers to independently develop and extend career-specific networks. The objective of the program is to support postdocs in increasing their self-reliance and further developing their profile. Postdocs can network with partners of their own choice and thus precisely tailor the modules to fit their career orientation and goals. ConYS enables postdocs to use professional networks as building blocks for their career strategy, for example for advancing their research projects, for preparing research proposals for third-party funding, for initiating their next postdoc position abroad, or for getting in touch with potential employees from the private sector. Networking partners can be other research groups in Germany or around the globe as well as universities, industry companies, and other organizations.

Additionally, there are multiple agreements with third parties (both public and private, domestic and international) to finance mobility schemes for KIT ECRs. The current lists contain more than 40 opportunities for outgoing travel programs for postdocs⁸ and more than 30 opportunities for PhD students⁹.

Both teaching and research staff may benefit from other international mobility schemes at KIT, including DAAD, euraxess, Erasmus+, Marie Curie, Fulbright, and others. ¹⁰ Finally, they may also benefit from Eucor – European Campus mobility schemes. ¹¹

2.2 University of Strasbourg

The University of Strasbourg is the only partner university that advertises all mobility opportunities in a single webpage, available here: https://www.unistra.fr/international/partir-a-linternational

There are different possibilities for students, PhD candidates, teaching and research staff, and administrative staff.

⁷ https://www.khys.kit.edu/conys.php

⁸ https://www.khys.kit.edu/english/outgoing_postdoc.php

https://www.khys.kit.edu/outgoing_doc.php

¹⁰ https://www.intl.kit.edu/ischolar/13485.php

[&]quot; https://www.intl.kit.edu/eucor-am-kit.php (German)

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Partir à l'international



Figure 1. Screenshot of the University of Strasbourg's Mobility homepage.

All teaching and research staff (up to 60 days) as well as PhD candidates (up to 12 months) can apply for their respective stream of Erasmus+ mobility grants, or work in a Eucor partner university.

Furthermore, doctoral candidates have the possibility of living in an international environment in Strasbourg (at the International University House), while teaching, research, and administrative staff have the option of benefitting from financial support from the University of Strasbourg for their own mobility projects.

2.3 Adam Mickiewicz University, Poznan

Adam Mickiewicz University, Poznan offers its students, doctoral students, and staff international exchange programmes, where they can go abroad or to other academic centres in the country to broaden their skills and acquire knowledge. The different schemes are advertised on their website: https://amu.edu.pl/wspolpraca/wymiana-akademicka

• Bilateral arrangements (within and outside of Europe)

Bilateral exchange is based on bilateral cooperation agreements between AMU and foreign higher education institutions. These agreements allow for the exchange of students (for one or two semesters) in order to complete part of their studies abroad on the basis of the agreed curriculum. AMU has over 110 agreements with EU countries and over 220 outside of EU in place.

Erasmus+

It offers an exchange for a specified duration of studies (from 3 to 12 months) or for internships (from 2 to 12 months) to 28 Member States of the European Union, as well as North Macedonia, Iceland, Liechtenstein, Norway, Turkey, and Serbia.

• Programme "Education"

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The main goal of the "Education" Programme is to reduce economic and social differences within the European Economic Area (EEA) and to strengthen bilateral relations between Poland and the Donor States (Iceland, Liechtenstein, Norway) in the field of education.

The following activities are possible under the "Education" Programme:

- Component 1 Professional staff development: Study visits to exchange experiences; Intensive training organization of short training sessions conducted in Poland by trainers / experts from the Donor States.
- Component 2 Mobility in higher education: Student mobility studies and internships; University staff mobility.
- Component 3 Institutional cooperation Vocational training: Development or updating of an educational offer; Exchange of experiences and good practices, organization of joint initiatives with partners from the Donor States; Develop or update local / regional / national strategies for the development of vocational / professional education and lifelong learning.
- Component 4 same as above, excluding vocational training (VET).
- Programme MOST (Bridge)
 The program enables a one-year exchange visit to another academic centre in Poland. Students can choose from over 20 universities in which they can study.

2.4 Aristotle University of Thessaloniki

Erasmus+ Framework

Researchers of Aristotle University of Thessaloniki can benefit from the Erasmus+ mobility scheme, based on the category they belong to. More specifically:

- Researchers that are permanent staff members of the university can realize either a Teaching or a Training mobility period abroad, either at an Erasmus+ programme country (mostly EU countries) or at an Erasmus+ partner country (non-EU countries). A teaching mobility refers to a 5-day visit to a HEI partner institution with an active bilateral Erasmus+ agreement and requires that staff members provide lectures of at least 8 hours. A training mobility has the same duration, but it can be realized either at a HEI (not necessarily a partner HEI) or at another organization that can provide a relevant training (i.e., research institutes, NGOs, etc). There is no obligation for an active bilateral agreement and therefore this mobility activity is more flexible. Regarding the selection procedure, staff members apply online providing all the required documentation and the final selection is made by the European Educational Programmes Committee, based on specific criteria.
- PhD students can realize a mobility abroad through the Erasmus+ Studies and Erasmus+ Traineeships programmes. Erasmus+ Studies require that PhD students select one of the partners HEIs and conduct part of their PhD research, while Erasmus+ Traineeships does not allow for a direct conduct of research, but provides PhD students the opportunity to be trained on a specific technique that could be used in the context of one's PhD research. Applications are online as well, accompanied by all required documents, and the selection is made by the Erasmus+ Coordinators of the Schools that applicants belong to, according to a university-wide point system. Both Erasmus+ Studies and Erasmus+ Traineeships programmes have a minimum duration of 2 months, although there is also a new short-term mobility category that allows for 5-30 days mobilities

The above-mentioned opportunities apply also to incoming staff members and PhD students.

Marie Curie Framework

AUTh is actively participating in researchers' mobility, through the framework of H2020 – Excellence Science – Marie Skłodowska-Curie Actions. These researchers' secondments are a period of training at the premises of another partner. The secondment always requires the movement of the researcher since his physical presence in the other partner's premises is required.

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RISE programs related to the mobility of the staff of the Institutions (Faculty Members, and supportive Teaching Staff) also exist.

Other Frameworks

AUTh researchers (that are only Faculty members) can participate on research mobilities to every University that has an official agreement with the University. This type of mobilities is financially supported by AUTh University upon the request of the Faculty member. A specific central committee is reviewing the applications and approving the mobility or not.

2.5 University of Natural Resources and Life Sciences, Vienna

BOKU lists its mobility possibilities on its website: https://boku.ac.at/en/boku-international

These are divided into "students" and "staff" sections, though doctoral candidates will find information relevant to them on both.

A selection of these mobility schemes is as follows:

- **CEEPUS Teaching Mobility** in Central and Eastern Europe (at least six hours of teaching and at least five days of stay).¹²
- Erasmus+ International Mobility for Staff Teaching and Training (temporarily suspended due to COVID-19).¹³
- Erasmus+ **Staff Training** (stays of up to two months).¹⁴
- Erasmus+ **Teaching Mobility** (stays between two days and two weeks, exceptionally up to two months). 15
- Info for post-doctoral researchers on research and teaching opportunities.¹⁶
- **KUWI Outgoings** for doctoral and habilitation candidates.¹⁷
- Others (euraxess, V4, etc.).¹⁸

2.6 University of Haute-Alsace

The University of Haute-Alsace advertises mobility opportunities on their website: https://www.uha.fr/fr/international.html.

Although no specific section exists for teaching and research staff yet, several programmes exist to promote research and teaching staff mobility. The relevant Erasmus+ schemes (KA 131 STA and STT) are open to all UHA staff. Teachers and researchers may apply to both, according to their goals. Mobility campaigns are

¹² https://boku.ac.at/en/international/themen/boku-staff-going-international/ceepus-lehrenden-mobilitaet?selectedTypes=group

¹³ https://boku.ac.at/en/international/themen/boku-staff-going-international/erasmus-internationale-mobilitaet-fuer-lehrende-und-personal?selectedTypes=group

¹⁴ https://boku.ac.at/en/international/themen/boku-staff-going-international/erasmus-personal-mobilitaet/erasmus-staff-training?selectedTypes=group

¹⁵ https://boku.ac.at/en/international/themen/boku-staff-going-international/erasmus-personal-mobilitaet/erasmus-lehrenden-mobilitaet?selectedTypes=group

¹⁶ https://boku.ac.at/en/international/themen/boku-staff-going-international/mobilitaetsplan?selectedTypes=group

¹⁷ https://boku.ac.at/en/international/themen/boku-students-going-international/kuwi-outgoings?selectedTypes=group

 $^{^{18} \} https://boku.ac.at/en/international/bok\underline{u-staff-going-international/other-possibilities-for-teaching-mobility}$

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initiated at the beginning of each academic year, and after a temporary suspension due to COVID-19, they are expected to begin in September 2022.

Doctoral candidates have diverse mobility schemes available to them, including co-supervision and Eucor mobility opportunities.

Teaching and research staff, as well as administrative staff, have mobility schemes available to them within Eucor – European Campus, namely the job-shadowing scheme Vis-ma-Vie ("Live my Life") scheme, whereby staff can apply for a staff exchange of several days at the German or Swiss members of Eucor (EPICUR partners KIT and Freiburg, as well as the University of Basel).

There is also an Invited Faculty scheme in place for outgoing and incoming research and teaching staff.

2.7 University of Freiburg

The University of Freiburg's International Office advises teaching and research staff on obtaining mobility funds and can also provide direct financial support for certain projects with international partners.

Funding opportunities include the Internationalisation Fund of the University of Fribourg, the Visiting Lecturer Programme of the University of Fribourg, as well as other funding sources.

The International Office also advises and assists teaching and research staff in the application process for programmes of the German Academic Exchange Service (DAAD), in particular the coordination of DAAD applications between the institutions and the university management.

Programmes are offered through the German-French Hochschule. Finally, Freiburg staff may also benefit from Eucor – European Campus mobility schemes.

2.8 University of Amsterdam

The University of Amsterdam does not advertise mobility schemes on its website, either in English or in Dutch. The following information is the result of direct exchanges with UvA colleagues.

The opportunities at university-wide level are organised within UvA's engagement in European and global networks, most notably LERU¹⁹ and U21²⁰.

Examples of mobility for UvA researchers in this context include the annual LERU <u>Doctoral Summer School</u>, and the following schemes through U21: Early Career Researcher <u>Workshops</u>, U21 <u>Researcher Resilience projects</u>, and UNICA <u>Staff mobility</u>.

In addition, UvA supports a large number of joint PhD projects with international partner universities. In this context, PhD candidates undertake part of their research project on-site at the partner university. The frequency and duration of these research stays vary per project, but should always constitute a significant proportion (approximately 30-40%) of the overall duration of the PhD project.

¹⁹ https://www.leru.org/

²⁰ https://universitas21.com/

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2.9 University of Southern Denmark

The University of Southern Denmark (SDU) does not advertise mobility schemes on its website, either in English or in Danish. The following are the result of direct contact with colleagues at the University of Southern Denmark.

The University of Southern Denmark lists mobility options for outgoing staff on their Intranet. ECRs (PhD candidates, post-docs) are considered staff at SDU and are thus eligible for these mobility formats, although they are not "research" based and are very short in duration.

Staff Mobility under the Erasmus+ Programme

Staff mobility for teaching:

• Shorter mobility periods at an eligible Erasmus+ partner institution, typically from 2 to 5 days. Must include a minimum of 8 teaching hours per week (or any shorter stay).

Staff mobility for training:

• Shorter mobility periods at an eligible Erasmus+ institution holding an ECHE (Erasmus Charter for Higher Education), typically from 2 to 5 days, OR in a public or private organisation active in the labour market or in the fields of education, training and youth, in any Programme Country.

For more information interested parties are advised to contact Didde Marie Bielefeldt-Petersen, staffmobility@sdu.dk at SDU International.

3. Mapping of general mobility formats

3.1 Marie-Skłodowska Curie Actions (MSCA)

As stated on their official website, the Marie Skłodowska-Curie Actions fund excellent research and innovation and equip researchers at all stages of their career with new knowledge and skills, through mobility across borders and exposure to different sectors and disciplines. The MSCA help build Europe's capacity for research and innovation by investing in the long-term careers of excellent researchers.

There are 5 types of MSCA targeting different objectives.

3.1.1 Doctoral Networks (DN)²¹

The objective of Doctoral Networks is to implement doctoral programmes by partnerships of organisations from different sectors across Europe and beyond to train highly skilled doctoral candidates, stimulate their creativity, enhance their innovation capacities and boost their employability in the long-term.

Doctoral Networks are open to international consortia of universities, research institutions, businesses, SMEs and other non-academic organisations. Doctoral Networks implement doctoral programmes, by partnerships of universities, research institutions and infrastructures, businesses including SMEs, and other socio-economic actors from different countries across Europe and beyond.

²¹ https://marie-sklodowska-curie-actions.ec.europa.eu/actions/doctoral-networks

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These doctoral programmes will respond to well-identified needs in various research and innovation areas, expose the researchers to the academic and non-academic sectors, and offer research training, as well as transferable skills and competences relevant for innovation and long-term employability.

3.1.2 Postdoctoral Fellowships (PF)²²

The objective of Postdoctoral Fellowships is to support researchers' careers and foster excellence in research. The Postdoctoral Fellowships action targets researchers holding a PhD who wish to carry out their research activities abroad, acquire new skills and develop their careers. PFs help researchers gain experience in other countries, disciplines and non-academic sectors.

There are 2 types of Postdoctoral Fellowships:

- 1. **European Postdoctoral Fellowships.** They are open to researchers moving within Europe or coming to Europe from another part of the world to pursue their research career. These fellowships take place in an EU Member State or Horizon Europe Associated Country and can last between 1 and 2 years. Researchers of any nationality can apply.
- 2. Global Postdoctoral Fellowships. They fund the mobility of researchers outside Europe. The fellowship lasts between 2 to 3 years, of which the first 1 to 2 years will be spent in a non-associated Third Country, followed by a mandatory return phase of 1 year to an organisation based in an EU Member State or Horizon Europe Associated Country. Only nationals or long-term residents of the EU Member States or Horizon Europe Associated Countries can apply.

Both types of fellowships may also include short-term secondments anywhere in the world during the fellowship (except during the return phase of a Global Fellowship).

In an effort to build bridges between the academic and non-academic sector, researchers can receive additional support to carry out a placement of up to 6 months in a non-academic organisation based in an EU Member State or Horizon Europe Associated Country. This placement needs to take place at the end of their fellowship.

3.1.3 Staff Exchanges (SE)²³

The Staff Exchanges action funds short-term international and inter-sectoral exchanges of staff members involved in research and innovation activities of participating organisations. The aim is to develop sustainable collaborative projects between different organisations from the academic and non-academic sectors (in particular SMEs), based in Europe and beyond.

Exchanged staff benefit from new knowledge, skills and career development perspectives, while participating organisations increase their research and innovation capacities. Staff Exchanges are open to international consortia of universities, research institutions, businesses, SMEs and other non-academic organisations. They need to include:

- at least three organisations in three different countries, two of which need to be located in a different EU Member State or Horizon Europe Associated Country
- above this minimum, the participation of organisations from any country is possible
- if all participating organisations are from the same sector (academic or non-academic), at least one must be from a non-associated Third Country

²² https://marie-sklodowska-curie-actions.ec.europa.eu/actions/postdoctoral-fellowships

²³ https://marie-sklodowska-curie-actions.ec.europa.eu/actions/staff-exchanges

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Individual staff members are selected by their sending organisations to take part in the planned exchanges.

3.1.4 COFUND²⁴

The COFUND action provides funding for regional, national and international programmes for training and career development, through co-funding mechanisms. It spreads the MSCA's best practices by promoting high standards and excellent working conditions. COFUND promotes sustainable training and international, interdisciplinary and inter-sectoral mobility.

A single legal entity in an EU Member State or a Horizon Europe Associated Country applies. Additional partners can be included in the project.

There are 2 types of COFUND:

- 1. **Doctoral Programmes.** They offer research training activities to allow doctoral candidates to develop and broaden their skills and competences. They will lead to the award of a doctoral degree.
- 2. **Postdoctoral Programmes.** They fund individual advanced research training and career development fellowships for postdoctoral researchers.

3.1.5 MSCA and Citizens²⁵

The objective of the MSCA and Citizens action is to bring research and researchers closer to the public at large, with a focus notably on families, pupils and students. It does so through the organisation of the European Researchers' Night, a research communication and promotion event taking place across EU Member States and Horizon Europe Associated Countries which aims to:

- contribute to promoting excellence research projects across Europe and beyond
- increase awareness among the general public of the importance and benefits of research and innovation and showcase its concrete impact on citizens' daily life
- heighten young people's interest in science and research careers

3.2 The Hubert Curien Partnerships (PHC)

A good example of a national research mobility framework are the Hubert Curien Partnerships, which promote the mobility of scientists involved in bilateral research projects, are an important component of France's program of scientific cooperation.²⁶

A French initiative coordinated within France by the Ministry of Europe and Foreign Affairs in cooperation with the Ministry of Higher Education, Research, and Innovation, the partnerships are financed by France and the foreign partner country. Schemes exist for 24 countries evenly spread around the world.

The funds allocated annually to partnerships in various countries make possible joint support for research at universities in France and the partner country, allowing researchers from universities in the two countries to collaborate.

3.3 Visiting Professor schemes

²⁴ https://marie-sklodowska-curie-actions.ec.europa.eu/actions/cofund

²⁵ https://marie-sklodowska-curie-actions.ec.europa.eu/actions/msca-citizens

²⁶ https://www.campusfrance.org/en/phc

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All partner universities count with schemes for receiving incoming visiting professors and sending outgoing visiting professors to other universities. However, these are for the most part bespoke bilateral arrangements between two institutions or even at a department or laboratory level, and information is often decentralised, which makes the mapping of all these initiatives an impossible task. Most of these arrangements are little institutionalised and are usually paid for by a university's own budget, even if different initiatives, like Erasmus+, MSCA, or Eucor, to name but a few, have tried to encourage this kind of mobility with extra funding.

By way of example, the Polish National Agency for Academic Agency encourages incoming visiting professors to come to Polish universities through several programmes, the most reputed of which is the NAWA Chair.²⁷ Similarly, in France, non-EU incoming visiting faculty's salaries and expenses are covered by Campus France instead of individual universities.

4. EPICUR mobility formats

The EPICUR Alliance, in its pilot phase, has developed four new mobility possibilities for researchers at partner universities, one open to doctoral candidates within the pilot phase of EPICUR Erasmus+, and the other three, which correspond to the EPICUR Pathway to Research, are open to all researchers—albeit with a special focus on early career researchers—and occur within the pilot phase of this project, EPICUR Research H2020.

- 1. The EPICUR PhD Exchange Programme Research, Training & Skills Development enables current doctoral/PhD candidates to collaborate on interdisciplinary research projects at other universities within the EPICUR alliance while also receiving the latest methods of training. Besides the emphasis on skills development and interdisciplinarity, this programme fosters cross-border exchanges, connects the regions of the European University and enables future academic generations to jointly work towards finding solutions to societal challenges that Europe and the world are currently facing.
- 2. **EPICamps** are virtual, interactive events aimed at young scientists from the EPICUR alliance in order to create a space for exchange, collaboration and academic matchmaking between scientists from different disciplines and areas. EPICamps are low threshold workshops, inspired by the barcamp (also known as unconference) format, offered to ECRs of the EPICUR alliance to engage with peers as well as established researchers with similar interests in order to pursue joint inter- and transdisciplinary projects on societal challenges. Due to their short duration and their fully virtual format, not all partners consider them a mobility format.
- 3. **EPICradles** are hybrid formats of mobility and run for approximately three months. They will bring together small groups of up to five ECRs from different partner universities for virtual and physical collaboration. Both groups will be working on topics relevant to one or more of the EPIChallenges and will have the chance to invite experts to discuss their ideas and project applications with.
- 4. **EPIClusters** are collaborative projects furthering international cooperation among researchers and non-academic professionals for tackling scientific and societal challenges and designed to support early career researchers in putting new ideas into action. They offer tailor-made experience at one of the partner universities for scholars, thinkers, and experts from both academic and non-academia, and serve as a network for science and ideas spanning the Alliance, and also serve as a first group experience in the early career researcher's professional life and provide EPICUR Fellows with the opportunity to complete a European research project.

²⁷ https://nawa.gov.pl/en/nawa/news/nawa-chair-a-prestigious-grant-for-research-in-poland-call-for-proposals-extended-until-may-31

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5. EPIMove: proposal for the creation of EPICUR's virtual mobility format

5.1 Foundation of EPIMove and draft agreement

This deliverable proposes the creation of an EPICUR mobility format, which will apply to all mobility actions of researchers in EPICUR partner universities within the alliance. This comes to complement the work being done by the EPICUR alliance on student mobility within the framework of the EPICUR Erasmus+ pilot phase project, which will continue in its second phase from November 2022 onwards.

The mobility of researchers within the Alliance aims to contribute to EPICUR's general objectives of strengthening and connecting European regions, their stakeholders, their entrepreneurial ecosystems and regional networks in which students, educators, researchers, mentors, investors, leaders, and experts from industry, civil society and non-governmental organisations are brought together as a unique and valuable resource for knowledge and innovation.

EPIMove should thus remain flexible and adaptable to a changing environment and differing needs of different researchers and research laboratories. Thus, it should allow for in-person, blended, and virtual mobility, it should enhance early career researchers' academic and professional prospects within their home institutions, the alliance, and beyond.

In line with EPICUR's general objective, EPIMove should aim to engage at least 50% of early career researchers working at EPICUR partner universities.



Figure 2: Researcher Mobility Process in EPIMove

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Setting in motion a centralised system to manage the mobility of researchers within the Alliance that goes beyond bespoke agreements between research labs and units is challenging and further work will be needed on the modalities of said scheme should the partners decide to go ahead with this proposal for an EPIMove mobility programme for EPICUR researchers.

A proposal for a draft agreement containing EPIMove mobility programmes carried out by researchers within the alliance is attached in the annex. This form is an adaptation of the work done within EPICUR's pilot phase for the mobility of doctoral candidates.

In the words of the European Commission in its Erasmus+ scheme, "a Mobility Agreement sets out the programme of teaching / training to be followed and is approved by the staff member, the sending and the receiving institution / organisation.

The agreement defines the components of the teaching or training period abroad and emphasises the mutual responsibility for the quality of the mobility of both the sending institution / organisation and the receiving institution / organisation."²⁸

5.2 Measuring EPIMove's success

Different indicators are proposed to measure the relevancy of EPIMove to EPICUR researchers, in order to evaluate and assess whether the scheme is useful to them or not, and to adapt it accordingly in the future. Measurements could be taken for each academic year since its establishment except for the last one, which might perhaps be more relevant 3-5 years down the line.

The proposed quantitative indicators to evaluate EPIMove are as follows:

- Total number of EPIMove mobility programmes;
- Average duration of EPIMove mobility programmes (in days/months);
- Percentage of available research mobility funds disbursed for EPIMove mobility programmes;
- Participation of EPICUR early career researchers in EPIMove mobility programmes per partner university;
- Participation of other European University Alliances' early career researchers in EPIMove mobility programmes (per alliance);
- Participation of non-EPICUR early career researchers in EPIMove mobility programmes;
- Participation of early career researchers in EPIMove mobility programmes per outgoing country;
- Participation of early career researchers in EPIMove mobility programmes per incoming country;
- Participation of early career researchers in EPIMove mobility programmes per career level (R1-R4);
- Percentage of drop-outs during an EPIMove mobility;
- Number of publications derived from an EPIMove mobility (3-5 years later, if applicable).

These indicators should be tested for efficiency within EPICUR and within EPIConnect (WP4). Given the lack of progress on EPIConnect at the time of writing, only the testing within EPICUR has been carried out thus far. A group of WP2 experts and EPICUR's Mobility Officer at Unistra were convened for a meeting to assess the solidity of these indicators to evaluate EPIMove's progress. EPICUR's Mobility Officer added the percentage of drop-outs to the list of indicators, as a learning outcome of work already done in EPICUR's pilot phase, and WP2 leader added the different drop-down indicators on participation in EPIMove by category.

²⁸ https://erasmus-plus.ec.europa.eu/resources-and-tools/mobility-and-learning-agreements/mobility-agreement

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The Early Career Researchers Board also contributed to this deliverable's work, particularly in the development of EPIMove and the policy recommendations given at the end of the deliverable.

Within EPICUR, these indicators will be further tested within WP1 for EPICamps and EPICradles and within WP3 for EPIClusters. Furthermore, and for internal evaluation and adjustment purposes, it is also proposed that surveys are sent out to EPIMove participants and interviews are carried out with them, or some of them if great affluence, in order to better understand the challenges they faced during their mobility and their learning outcomes.

6. Conclusions and policy recommendations

The mapping exercise highlighted some significant shortcomings in the different mobility schemes offered to researchers within the EPICUR Alliance, particularly to profiles that are caught in between (too junior to be permanent lecturers or tenured professors, but too senior to benefit from Erasmus+ schemes). The difference in legal status of PhD candidates and post-doctoral researchers across partners of the alliance is also noteworthy and, as identified in the development of the EPICUR PhD Exchange Programme, it causes administrative problems both for incoming and outgoing candidates for mobility when the host and home institutions do not agree on what this status is.

Furthermore, there is a big difference in the depth and breadth of mobility schemes offered by different EPICUR partner universities. While Unistra offers financial support to all ECRs in whatever mobility project they come up with, KIT and BOKU offer a breadth of opportunities financed with third-party funding, AMU, AUTh and SDU offer mostly EU-funded opportunities and UHA is essentially limited to mobility within Eucor . ALU-FR offers mobility funding but does not specify how, which is true to a certain extent of SDU too.

In light of these divergences, tasks (b) and (c) within Activity 2.2.2, namely the elaboration of EPICUR virtual and blended mobility formats and the setting of indicators to be spread out via EPIConnect, respectively, cannot be carried out at the moment. For task (b), EPICUR's own formats cannot be developed because there is no common understanding or approach to researcher mobility within the alliance. This reflection, which must lead to significant legal and financial modifications to the statutes of most EPICUR members, needs to involve other stakeholders within the partners as well as their senior governance, and it will certainly take time to achieve. For task (c), which can only occur after the reflection needed in task (b), EPIConnect must also have been developed, and that is not the case now.

Importantly, access to information is a big issue for some members of the alliance. KIT and Unistra offer the clearest and most structured information to all outgoing ECRs, whatever their status. BOKU also places all information online, however with improvable UI and UX. Other universities only make partial information available online, like for instance SDU which published a limited version on the intranet and asks interested candidates to e-mail the person in charge of staff mobility, or AUTh which only publishes a list of agreements but not how ECRs can apply to those. UvA does not publish anything at all on its public website. Readers of this deliverable will see how differently the information is presented at each EPICUR university.

EPICUR members who are not members of Eucor can only send their staff to other EPICUR partners through Erasmus+ or the pilot formats developed within the framework of EPICUR-Research.

Three main policy recommendations arise from this:

1. The streamlining of how information on mobility is presented to members across all partner universities, so that ECRs, research, teaching, and administrative staff can all find their options for

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outgoing mobility schemes easily, in clear terms, and through open access, without having to contact anybody to ask for the information.

This should be done in a harmonised format for all universities in the alliance, so that information is presented with the same variables. In the interest of ECR interests, the suggestion is to present the information mixing the formats given by Unistra, AMU, and KIT: filtering mobility options by status (staff, post-doc, PhD, etc.), geographic zone (domestic, EU, wider Europe, international, etc.) and by type of mobility (short stay, long stay, remote exchange, etc.). Furthermore, information on available Marie Curie exchanges could also be streamlined or made available in a far clearer way.

2. A double use of EPIMove.

Firstly, short mobility schemes for academic staff at other universities in the alliance should be fostered and occur under an EPICUR label – and perhaps funding. These are largely possible already through other schemes, like Erasmus+ or Eucor and KTUR for certain members, but the objective should be to increase the level of staff mobility across the EPICUR Alliance on EPICUR terms, with whatever source of funding is available. Although not within the auspices of EPICUR Research, this kind of mobility could be expanded to technical and administrative staff through other forms of funding (Erasmus+, etc.).

Secondly, an academic mobility scheme should be developed for post-doctoral researchers, given that in most universities they are excluded from academic mobility options because they are too senior but also from teaching faculty mobility because they are either too junior or do research only. Doctoral candidates could be in the scope of EPIMove as well, but focus should be given to post-docs, given doctoral candidates' inclusion and coverage in EPICUR Erasmus+ pilot and second phase mobility schemes.

3. Creation of joint MSCA actions between EPICUR members.

EPICUR partner universities should recognise the interest of some of the Marie Sklodowska-Curie Actions, particularly Doctoral Networks, Postdoctoral Fellowships and Staff Exchanges, in order to fund EPIMove, and seek to obtain financing through these schemes, either at the alliance level or comprising at least some of the partners.

This does not preclude other forms of cooperation on research between the partners, for example through the development of common Horizon Europe research projects between EPICUR researchers, or projects with other national and international funding sources, which may also entail researcher mobility.

This deliverable shows that a lot of work remains to be done in the field of researcher mobility, starting with access and availability of information, and finishing with the establishment of a formal mobility mechanism for researchers within the alliance. Some of the actions, proposals and recommendations in this deliverable are more ambitious than others, but all of them, even the simplest ones, carry a large multiplying factor in terms of the benefits they will bring to researchers of partner universities, particularly those who are still early in their career.

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7. Annex 1: EPIMove form

Appendix ... to the EPIMove Mobility Agreement for Researchers Between EPICUR European Universities Alliance partner universities

on EPICUR Researcher Mobility
Exchange Agreement

	ACADEMIC YEAR 20	0/20
	LAST NAME(S)	
	FIRST NAME(S)	
	GENDER	
	DATE OF BIRTH	
RESEARCHER	NATIONALITY	
	CAREER STAGE	
	RESEARCH FIELD	
	ID NUMBER	
	(IF APPLICABLE)	
	Name	
	INSTITUTION CODE	
	INSTITUTE/CENTRE	
SENDING INSTITUTION	ON COUNTRY	
	CONTACT PERSON	
	(NAME, POSITION,	
	E-MAIL, PHONE)	
	NAME	
	INSTITUTION CODE	
	(IF APPLICABLE)	
	INSTITUTE/CENTRE	
RECEIVING	COUNTRY	
ORGANISATION/	SIZE OF ORGANISATION/	☐ < 250 EMPLOYEES
ENTERPRISE/	ENTERPRISE (IF APPLICABLE)	☐ > 250 EMPLOYEES
INSTITUTION	CONTACT PERSON	
	(NAME, POSITION,	
	E-MAIL, PHONE)	
	MENTOR	
	(NAME, POSITION,	
	E-MAIL, PHONE)	

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BEFORE THE MOBILITY

Table A – Research Programme at the Receiving Organisation/Enterprise/Institution

PLANNED PERIOD OF	FROM [MONTH/YEAR]TO [MONTH/YEAR]
THE MOBILITY	OPTIONAL (IF SPLITTING MOBILITY INTO TWO OR MORE PERIODS):
	AND FROM [MONTH/YEAR] TO [MONTH/YEAR]
	AND FROM [MONTH/YEAR]TO [MONTH/YEAR]
RESEARCH PROJECT	
NESEARCH PROJECT	
NUMBER OF WORKING	
HOURS PER WEEK	
FORMAT OF STAY	VIRTUAL/ONLINE ☐ ON-SITE/PHYSICAL ☐ HYBRID/BLENDED ☐
DETAILED	
PROGRAMME	
T	V D N- D
TRAINEESHIP IN	YES NO NO
DIGITAL SKILLS	IF YES, PLEASE SPECIFY:
KNOWLEDGE, SKILLS	
AND COMPETENCES TO	
BE ACQUIRED BY THE	
END OF THE STAY	
(EXPECTED RESEARCH OUTCOMES)	
MONITORING PLAN	FREQUENCY OF MEETINGS WITH SUPERVISOR/MENTOR: TIMES PER MONTH
(AT THE RECEIVING	OTHER DETAILS (PLEASE SPECIFY):
ORGANISATION/	OTTER DETAILS (FLEASE SPECIFI).
ENTERPRISE/	
INSTITUTION)	
EVALUATION PLAN	
(AT THE RECEIVING	
ORGANISATION/	
ENTERPRISE/	
INSTITUTION)	
LANGUAGE	THE LEVEL OF LANGUAGE COMPETENCE IN [INDICATE HERE THE MAIN
COMPETENCE	LANGUAGE OF WORK] THAT THE RESEARCHER ALREADY HAS OR AGREES TO
(WORKING LANGUAGE)	ACQUIRE BY THE START OF THE MOBILITY PERIOD IS:
	A1 A2 B1 B2 C1 C2 NATIVE SPEAKER
SECOND LANGUAGE (IF	THE LEVEL OF LANGUAGE COMPETENCE IN [INDICATE HERE THE
APPLICABLE)	SECOND LANGUAGE AGREED UPON] THAT THE RESEARCHER ALREADY HAS OR
	AGREES TO ACQUIRE BY THE START OF THE MOBILITY PERIOD IS:

EPICUR-Research D_{2.4} EPIMove Page 22 on 25 A1 □ A2 □ B1 □ B2 □ C1 □ C2 □ NATIVE SPEAKER □ Table B - Sending Institution Accident Insurance for the Researcher THE SENDING INSTITUTION WILL PROVIDE AN THE ACCIDENT INSURANCE COVERS: ACCIDENT INSURANCE TO THE RESEARCHER (IF NOT - ACCIDENTS DURING TRAVELS MADE FOR WORK PROVIDED BY THE RECEIVING ORGANISATION/ PURPOSES: YES ☐ NO ☐ **ENTERPRISE/INSTITUTION):** - ACCIDENTS ON THE WAY TO WORK AND BACK FROM YES No No WORK: YES ☐ NO ☐ THE SENDING INSTITUTION WILL PROVIDE A LIABILITY INSURANCE TO THE RESEARCHER (IF NOT PROVIDED BY THE RECEIVING ORGANISATION/ENTERPRISE/INSTITUTION): YES
No Table C – Receiving Organisation/Enterprise/Institution THE RECEIVING ORGANISATION/ENTERPRISE/INSTITUTION WILL PROVIDE IF YES, AMOUNT FINANCIAL SUPPORT TO THE RESEARCHER FOR THE RESEARCH STAY: YES (EUR/MONTH): ___ No 🗆 THE RECEIVING ORGANISATION/ENTERPRISE/INSTITUTION WILL PROVIDE A CONTRIBUTION IN KIND TO THE RESEARCHER FOR THE RESEARCH STAY: YES \square No \square IF YES, PLEASE SPECIFY: THE RECEIVING ORGANISATION/ENTERPRISE/ THE ACCIDENT INSURANCE COVERS: INSTITUTION WILL PROVIDE AN ACCIDENT - ACCIDENTS DURING TRAVELS MADE FOR WORK PURPOSES: YES ☐ NO ☐ INSURANCE TO THE RESEARCHER (IF NOT PROVIDED BY THE SENDING INSTITUTION): YES ☐ NO ☐ - ACCIDENTS ON THE WAY TO WORK AND BACK FROM WORK: YES □ NO □ THE RECEIVING ORGANISATION/ENTERPRISE/INSTITUTION WILL PROVIDE A LIABILITY INSURANCE TO THE RESEARCHER (IF NOT PROVIDED BY THE SENDING INSTITUTION): YES \square No \square THE RECEIVING ORGANISATION/ENTERPRISE/INSTITUTION WILL PROVIDE APPROPRIATE SUPPORT AND EQUIPMENT TO THE RESEARCHER. UPON COMPLETION OF THE RESEARCH STAY, THE ORGANISATION/ENTERPRISE/INSTITUTION UNDERTAKES TO ISSUE A MOBILITY CERTIFICATE WITHIN 5 WEEKS AFTER THE END OF THE RESEARCH STAY. Commitment BY SIGNING THIS DOCUMENT, THE RESEARCHER, THE SENDING INSTITUTION AND THE RECEIVING ORGANISATION/ENTERPRISE/INSTITUTION CONFIRM THAT THEY APPROVE THE RESEARCH AGREEMENT AND THAT THEY WILL COMPLY WITH ALL THE ARRANGEMENTS AGREED BY ALL PARTIES. THE RESEARCHER AND RECEIVING ORGANISATION/ENTERPRISE/INSTITUTION WILL COMMUNICATE TO THE SENDING INSTITUTION ANY PROBLEM OR CHANGES REGARDING THE MOBILITY PERIOD.

	NAME	E-MAIL	Position	DATE	SIGNATURE
RESEARCHER			RESEARCHER		

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RESPONSIBLE PERSON AT THE SENDING INSTITUTION			
SUPERVISOR AT THE RECEIVING ORGANISATION/ENTERPRISE/INSTITUTION			

DURING THE MOBILITY

Table A2 – Exceptional Changes to the Research Programme at the Receiving Organisation/Enterprise/Institution

(to be approved by e-mail or signature by the student/doctoral candidate, the responsible person at the Sending Institution and the responsible person at the Receiving Organisation/Enterprise/Institution)

PLANNED PERIOD OF	FROM [MONTH/YEAR]TO [MONTH/YEAR]
THE MOBILITY	OPTIONAL (IF SPLITTING MOBILITY INTO TWO OR MORE PERIODS):
	AND FROM [MONTH/YEAR] TO [MONTH/YEAR]
	AND FROM [MONTH/YEAR] TO [MONTH/YEAR]
RESEARCH PROJECT	
NUMBER OF WORKING	
HOURS PER WEEK	
FORMAT OF STAY	VIRTUAL/ONLINE ☐ ON-SITE/PHYSICAL ☐ HYBRID/BLENDED ☐
DETAILED	
PROGRAMME OF THE	
RESEARCH STAY	
KNOWLEDGE, SKILLS	
AND COMPETENCES TO	
BE ACQUIRED BY THE	
END OF THE RESEARCH	
STAY (EXPECTED LEARNING	
OUTCOMES) MONITORING PLAN	
(AT THE RECEIVING	
ORGANISATION/	
ENTERPRISE/	
INSTITUTION)	
INSTITUTION)	I .

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EVALUATION PLAN
(AT THE RECEIVING
ORGANISATION/
ENTERPRISE/
INSTITUTION)

AFTER THE MOBILITY

Table D - Mobility Certificate by the Receiving Organisation/Enterprise/Institution

NAME OF THE RESEARCHER	
RESEARCHER	Name
RECEIVING	SECTOR
ORGANISATION/ ENTERPRISE/ INSTITUTION	ADDRESS (STREET, CITY, COUNTRY, PHONE, E-MAIL ADDRESS, WEBSITE)
START DATE AND END DATE OF THE STAY	FROM [MONTH/YEAR] TO [MONTH/YEAR] OPTIONAL (IF SPLITTING MOBILITY INTO TWO OR MORE PERIODS): AND FROM [MONTH/YEAR] TO [MONTH/YEAR] AND FROM [MONTH/YEAR] TO [MONTH/YEAR]
RESEARCH PROJECT	
DETAILED PROGRAMME OF THE STAY INCLUDING TASKS CARRIED OUT BY THE RESEARCHER	
KNOWLEDGE, SKILLS (INTELLECTUAL AND PRACTICAL) AND COMPETENCES ACQUIRED (ACHIEVED LEARNING OUTCOMES)	

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EVALUATION OF THE RESEARCHER	
DATE	
NAME AND SIGNATURE OF THE SUPERVISOR AT THE RECEIVING ORGANISATION/ ENTERPRISE/	

Glossary

Nationality: country to which the person belongs administratively and that issues the ID card and/or passport.

Professional status: career level of the researcher (measured in the EU's scale of R1, R2, R3, R4).

Field of expertise: academic discipline in which the researcher works.

Contact person at the Sending Institution: a person who provides a link for administrative information and who, depending on the structure of the higher education institution, may be the departmental coordinator or works at the international relations office or equivalent body within the institution.

Contact person at the Receiving Organisation/Enterprise/Institution: a person who can provide administrative information within the framework of EPICUR traineeships.

Mentor: the role of the mentor is to provide ongoing support, encouragement and information to the researcher regarding the organisation/enterprise/institution (e.g. culture of the organisation/enterprise/institution, informal code of conduct, etc.). Ideally, the mentor should be a different person than the supervisor.

Level of language competence: a description of the European Language Levels (CEFR) is available at: https://www.coe.int/en/web/common-european-framework-reference-languages/level-descriptions

Responsible person at the Sending Institution: this person is responsible for signing the Mobility Agreement, amending it if needed and recognising the work and associated learning outcomes on behalf of the responsible academic body as set out in the Mobility Agreement. The name and email of the Responsible person must be filled in only in case it differs from that of the Contact person mentioned at the top of the document.

Supervisor at the Receiving Organisation/Enterprise/Institution: this person is responsible for signing the Mobility Agreement, amending it if needed, supervising the researcher during the mobility and signing the Mobility Certificate. This may also include an assessment of training needs and support in arranging for training. The name and email of the Supervisor must be filled in only in case it differs from that of the Contact person mentioned at the top of the document.