



**POLICY
ANSWERS**

D5.5

**Report on
Western Balkans
Regional Mobility
Scheme**

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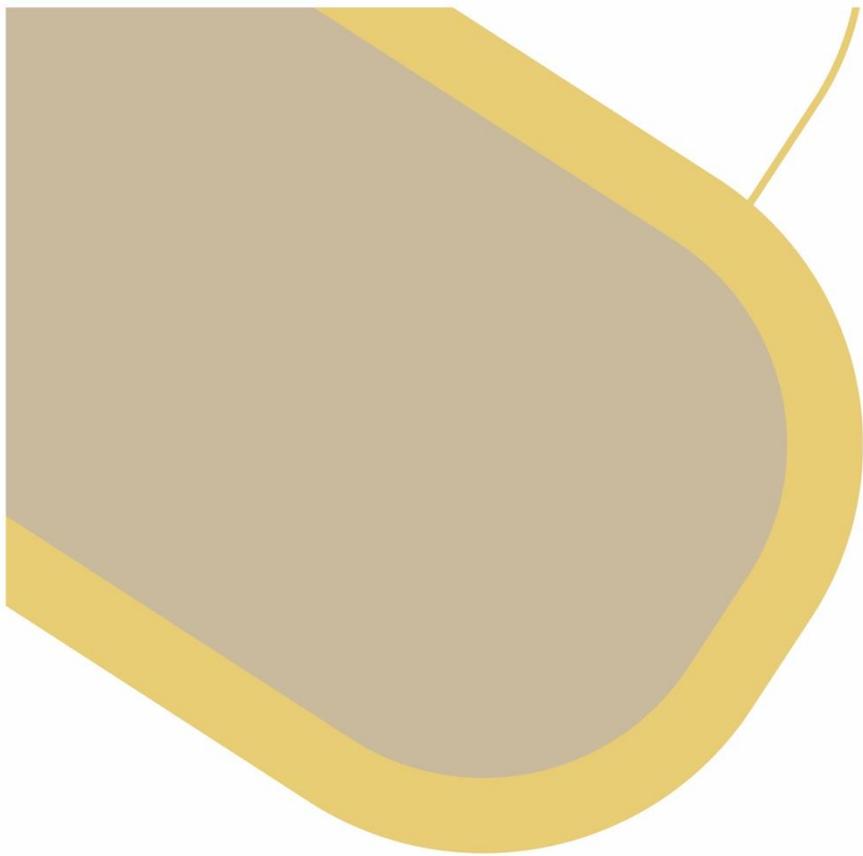
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List of Abbreviations

Abbreviation	Full name
ARRS	Slovenian Research Agency
CBHE	Capacity Building in Higher Education
CMS	Call Management System
COST	European Cooperation in Science and Technology
ECR	Early-Career Researcher
EC	European Commission
ERA	European Research Area
ERA-NET	European Research Area Net
EU	European Union
FAQ	Frequently Asked Questions
GDPR	General Data Protection Regulation
HEI	Higher Education Institutions
HRZZ	Croatian Science Foundation
IA	Implementation agency
IFM	Innovation Fund of Montenegro
IP	Implementation Plan
ISF	International Service Facility
MoU	Memorandum of Understanding
MSCA	Marie Skłodowska-Curie Actions
NASRI	National Agency for Scientific Research and Innovation
NCP	National Contact Point
NGO	Non-Governmental Organisation
PhD	Doctor of Philosophy
Q&A	Question and Answers
PRO	Public Research Organisation
R&I	Research and Innovation

RCC	Regional Cooperation Council
RECAS	Regional Network of Centres for Advanced Studied In Southeast Europe
RFSEE&WB	Rectors' Forum of Southeast Europe and Western Balkans
RI	Research Infrastructure
RPO	Research Performing Organisation
S3	Smart Specialisation Strategy
SSH	Social Sciences and Humanities
SME	Small & medium sized enterprises
TOR	Terms of References
UEFISCDI	Executive Agency for Higher Education, Research, Development and Innovation Funding
WB	Western Balkans
WBF	Western Balkans Fund
WBIV	Western Balkans Innovation Vouchers
WBMS	Western Balkans Mobility Scheme

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1 Introduction

This report provides an overview on the preparation, implementation and evaluation of the Western Balkans Mobility Scheme (WBMS) carried out within the POLICY ANSWERS - R&I POLICY making, implementation AND Support in the WEsteRn BalkanS project, launched on 1 March 2022 and funded under Horizon Europe¹. Positioned well in line with the European Union (EU) Western Balkans² (WB) Agenda on Innovation, Research, Education, Culture, Youth and Sport³ (WB Agenda), POLICY ANSWERS monitors and supports policy coordination within the EU-WB cooperation, but also provides capacity building and pilot actions in the WB to contribute to the region's EU integration process and to strengthen its innovation ecosystems. One task of POLICY ANSWERS was to establish a researcher mobility grant scheme piloted in its implementation with the potential to be scaled up with co-funding of other actors: The WBMS.

The aim of the WBMS was to enhance regional cooperation and sustained support in mobility-driven Research & Innovation (R&I) and - by fostering the interconnectedness of the WB - to support sustainable economic growth, a common regional market, societal resilience and convergence of the WB with the EU. Enhanced cooperation and sustained support in mobility-driven R&I were also pivotal for equipping the WB with the requisite tools and knowledge to address shared challenges, such as climate change and digital transformation, while fostering a generation of innovators who can contribute to reshape the region's future. The importance of regional cooperation and researchers' mobility is furthermore highlighted by the fact that it is one of the priorities of the Berlin Process⁴.

This report follows the implementation steps of the WBMS in chronological order and provides key findings at the end of each of the chapters dealing with either the preparation or the implementation or the evaluation of the WBMS (chapters 2-4).

In addition to the WBMS, other regional pilot measures have been prepared within POLICY ANSWERS:

1. Western Balkans Innovation Vouchers (WBIV)
2. Western Balkan R&I Youth Awards
3. Regional Promoter Scheme for Research Infrastructures (RI)
4. Western Balkans Regional Innovation Academy

¹ <https://westernbalkans-infohub.eu/about/>. Accessed 29 October 2025.

² The Western Balkans comprise Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia.

*This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence

³ <https://op.europa.eu/en/publication-detail/-/publication/22b8829d-b786-11eb-8aca-01aa75ed71a1/language-en>. Accessed 20 January 2026.

⁴ <https://www.berlinprocess.de/>. Accessed 20 January 2026.

2 Preparing the Western Balkans Mobility Scheme (WBMS)

2.1 Analysis and pre-selection by the POLICY ANSWERS team on the scope of the pilot mobility programme

The concept and the scope of this mobility programme was based on one of four ideas (three on regional mobility, one on intersectoral mobility) identified and outlined by International Service Facility (ISF) authors Dr Göran Melin (Technopolis Group), Dr Klaus Schuch (ZSI) and Dr Elke Stewering (DLR) in their 2021 report “Researchers’ Mobility in the Western Balkans”⁵.

In order to use the upcoming POLICY ANSWERS workshop on researchers’ mobility with regional experts and stakeholders to discuss the options of such a scheme and identify and plan concrete steps for the subsequent development and implementation together with regional actors efficiently, it became clear that a pre-selection among the four ideas had to be made by the POLICY ANSWERS partners.

So, an input paper (see 6.1) was prepared, elaborating on each of the four ideas for mobility schemes in order to analyse their feasibility, relevance and future possibilities and - in doing so - to identify the proposed scheme as pilot measure. The findings of this paper were discussed during an internal virtual workshop on 1 March 2023 and it was decided that the mobility scheme to be developed should promote and support the Open Access use of the huge amount of underused RI (facilities, resources and services) across the WB.

2.2 The Implementation Agency (IA)

Although a total budget of EUR 100,000 was available for the grants within the pilot mobility scheme, however, no additional budget had been earmarked for the implementation of the call. POLICY ANSWERS had two options to spend the budget, either directly giving grants to mobile researchers or hosting organisations with a maximum of 60.000 per grant (grants to third parties) or by concluding a contract with another organisation who would implement the mobility scheme (service agreement).

In order to enhance capacity building in the region it was decided to address potential implementation agencies (IA) in the region and its vicinity in a first step. Terms of References were prepared and an analysis of potential IA was carried out. Finally, five IA were addressed in April 2022: The Innovation Fund of Montenegro (IFM), the Croatian Science Foundation (HRZZ), the Slovenian Research Agency (ARRS), the Executive Agency for Higher Education, Research, Development and Innovation Funding (UEFISCDI) in Romania and the National Agency for Scientific Research and Innovation (NASRI) in Albania. In the end, almost none of them had any interest in acting as an IA. Although IFM would have been interested, according to their regulations they had not been allowed to do so.

With regard to this result, it was decided that DLR would implement the pilot programme itself, giving grants to mobile researchers in the form of grants to third parties.

⁵ Report “Researchers’ Mobility in the Western Balkans”. INTERNATIONAL SERVICE FACILITY. Authors: Dr. Göran Melin, Technopolis Group; Dr. Klaus Schuch, ZSI; Dr. Elke Stewering, DLR-PT. Date: 10 May 2021, revised version: 17 August 2021

2.3 Workshop on mobility on 14-15 September 2023 at the RCC in Sarajevo

Back-to-back with the “Conference on Aligning Priorities in the Western Balkans“ and the “Workshop on Research Infrastructures”, the workshop “Designing a regional mobility scheme for better access to RI in the Western Balkans” was held in the premises of the Regional Cooperation Council (RCC) in Sarajevo. POLICY ANSWERS invited experts from all six Western Balkan economies as well as international experts to discuss a pilot mobility scheme for early-stage researchers. Based on a first concept with cornerstones of a future regional mobility scheme, key aspects of the measure were defined such as aim, target group, duration, financing, application and evaluation procedures as well as their possible integration into the local research landscape with crucial regional expertise from the Western Balkans. The question of how to ensure sustainability of such a regional mobility scheme was also tackled.

2.4 Preparing the outline and integrating advice from regional, economy-level and international experts

Based on the successful POLICY ANSWERS workshop in Sarajevo, where the project gathered a lot of experience and expertise from stakeholders in the region, the project team prepared a first internal outline of the scheme, which was designed as a living document. As a next step, the project addressed additional external regional, economy-level and international stakeholders with this outline in order to request support in the further preparation process as well as in promoting this mobility scheme. The aim was to use these synergies and to avoid possible overlaps with already existing funding schemes. Table 1 provides an overview of the involved stakeholders.

Table 1: List of stakeholders involved in the WBMS concept phase

<u>Organisation</u>	<u>Acronym</u>
Center for Science and Innovation for Development	SCiDEV
Central European Exchange Program for University Studies	CEEPUS
Central European Initiative	CEI
Danube Funding Coordination Network	DFCN
Danube Rectors' Conference	DRC
Federal Ministry of Women, Science and Research of Austria	BMFWF
German Academic Exchange Service	DAAD
Joint Science Conference of the Berlin Process	
Ministry of Civil Affairs of Bosnia and Herzegovina	MCP
Ministry of Education and Science of North Macedonia	MON
Ministry of Education and Sport of Albania	MAS
Ministry of Education, Science and Innovation of Montenegro	MPNI
Ministry of Science, Technological Development and Innovation of Serbia	NITRA
Ministry of Education, Science, Technology and Innovation of Kosovo*	MASHT
Rectors' Forum of Southeast Europe and Western Balkans	RFSEE&WB

Regional Cooperation Council	RCC
Western Balkan Alumni Association	WBAA
Western Balkans Fund	WBF

By mid of March 2024, the scheme was consolidated with the following features:

- Aim is to support sustainable economic growth, societal resilience and convergence of the Western Balkans with the European Union by fostering regional cooperation and sustained support in mobility-driven R&I;
- Three objectives of the scheme:
 - Fostering brain circulation and encourage brain retain within the WB at an early stage of the researchers' careers
 - Supporting excellence in research in the WB
 - Promoting and increasing the Open Access use of RI across the Western Balkans
- Building the ground for a follow-up of the mobility scheme to be funded by regional, economy-level or international stakeholders;
- Projects must cover all of following aspects:
 - short-term mobility as physical presence of the grantee for a duration of between two weeks and two months within another WB economy
 - the use of specialised equipment or facilities (RI) in another WB in order to do research
- All thematic research areas are eligible;
- Applications that address the twin transition (green and digital) and priorities mentioned in economy-level research strategies/S3 strategies are particularly welcome;
- As Early Career Researcher (ECR) only PhD students and post-docs, whose doctorate was awarded no longer than seven years before deadline of the call are eligible as grantees;
- Definition of RI according to the definition of the European Commission as a set of facilities, resources and services (like laboratories, equipment, facilities, data, archives, libraries) that are used by the research communities to conduct research and foster innovation in their respective fields;
- Overall EUR 100,000 as total budget for the grants available;
- Maximum project duration between two weeks and six months;
- Maximum EUR 5,000 per grant;
- Eligible costs: travel costs and living allowances as unit costs, accession fees, consumables etc. by host institution, costs for exploitation of project results (publication of scientific article, etc.);
- Call to be open by: 28 March 2024;
- Call will be closed: 31 May 2024;
- Projects expected to start: 1 October 2024 or later (but all projects must be terminated by 31 May 2025).

2.5 Preparing the call management system

As online application tool, “PT-Outline” was adapted and managed by DLR.

PT-Outline was developed for online submission and handling of project proposals. This tool had been developed and tested during the implementation of joint calls of European ERA-NETs from the EU Sixth Framework Programme onwards. Since PT-Outline has been continuously updated and advanced in recent years, nowadays it is used across the entire DLR for international joint calls, no matter if bi- or multilateral.

General specifications of PT-Outline were:

- data input and data handling via web forms;
- input data are stored and are fully editable by applicant until finalisation of proposal;
- error minimisation by mandatory fields and check routines;
- automated confirmation about successful submission of application via email;
- password-protected access to proposal according to “one application - one login” principle;
- export functions via Microsoft Access and/or Excel interface for statistical purpose and further processing of data for assessment and contracting phase;
- export of application as pdf for print out and signing;
- compliance with the General Data Protection Regulation (GDPR) of the DLR.

In order to lessen the efforts for applicants and peer reviewers and to reflect the limited funding sum of the projects, all data had to be inserted by the applicant in an online form, so a database of all application data was generated that could be used for statistical analyses and further processing. No additional project description had to be uploaded. The inserted data covering the project description were limited to around 12,000 characters (including blanks, this would result in about four A4 pages).

Main elements of applications were information on the basics, home institution and early-career researcher, host institution and counsellor (mentor at host institution), project description and requested funds. In addition, CVs of the grantee and the counsellor (in EUROPASS format) had to be uploaded.

2.6 Preparing the call documents

2.6.1 Implementation plan

An elaborated implementation plan (see 6.2) was prepared in order to present in detail the procedures of the call, including the launch, the application and assessment phase, the contracting and the reporting as well as the timetable of the call. In addition, templates of the funding contract, the necessary letter of confirmation of the home and the host institution were prepared and included.

2.6.2 Guide for applicants

A detailed guide for applicants was prepared (see 6.3), which listed the overall principles of the pilot mobility scheme (quality, transparency, equality of treatment, impartiality etc.) and answered questions, that applicants might have (FAQ) such as:

- How do I apply?
- Do I have to submit a hard copy of my application?
- What does it mean that the maximum requested budget must not exceed EUR 5,000?

- Is it allowed to submit more than one application?
- Is it allowed to visit more than one RI?
- Is it allowed to visit RI in more than one other country?
- How many applications will be funded?
- Am I eligible?

Furthermore, the guide provided screenshots and further information on the Call Management System (CMS) and the technical aspects of the application process. Information about the contracting process and financial support contract form were also part of the guide for applicants in order to ensure transparency and to speed up the contracting process.

2.6.3 Call text

On the basis of the implementation plan and with the advice from the external experts listed in Table 1, the outline was finally transformed into the call text (see 6.4) providing on the one hand all legally relevant information and on the other hand all details that potentially applicants had to know, in order to decide about an application.

2.7 Establishing the WBMS reviewers database

It was decided that the applications had to undergo external remote assessment. Since the call was thematically open and in order to provide a sufficient thematic fit of the reviewers, a pool of experts was established. For this reason, a call for reviewers was launched at the project's website as well as on the DLR website and in several German and EU-wide newsletters.

Interested prospective independent reviewers were expected to fulfil the following criteria:

- must have appropriate English language skills;
- must hold the nationality of a European Union member state or a country that is associated to the Horizon Europe programme;
- in addition, all reviewers must have at least more than five years of active postgraduate research experience.

The reviewers had to commit themselves by signing a “Code of conduct for reviewers of the POLICY ANSWERS Pilot Scheme: Western Balkans Mobility Scheme” towards DLR, stating that they will conform with the principles outlined therein.

Finally, a total of 391 experts registered in the WBMS reviewers database until 14 July 2024, representing more than 32 different nationalities and covering a broad field of different expertise.

A guide for reviewers was prepared which informed about general principles of the assessment process. The guide also gave advice in concrete terms for the implementation of the assessment. According to the small effort for each assessment - not more than 20 minutes per application were expected due to the short applications - reviewers received a symbolic remuneration (EUR 25 per assessment).

2.8 Establishing the Steering Group

The Steering Group was the panel which was responsible for the funding decision, it decided about applications to be funded and those to be put on the reserve list. This group was composed of a total of nine participants, with one representative or nominee from the respective ministry responsible for research in each of the six WB economies, and three

representatives of regional organisations. This composition was chosen in order to include the region in the decision process in order to ensure transparency as well as sustainability.

2.9 Key findings of the preparation process of the WBMS

During the preparation phase of the WBMS, the following insights were gained:

- A high degree of involvement of all Western Balkans economies was observed in the design of the WBMS due to project partners, workshop participants and multipliers from the entire region;
- by intensive analysis of already existing mobility programmes the niche for the WBMS could be ensured;
- relatively limited budget for each of the WBMS projects should lead to a high number of projects, in doing so a huge mobilisation of young researchers all over the WB was expected;
- maximum WBMS project duration of six months;
- intra-regional mobility, young researchers, use of RI and doing research are the cornerstones of the WBMS.

3 Implementing the WBMS

3.1 Promotion and support measures

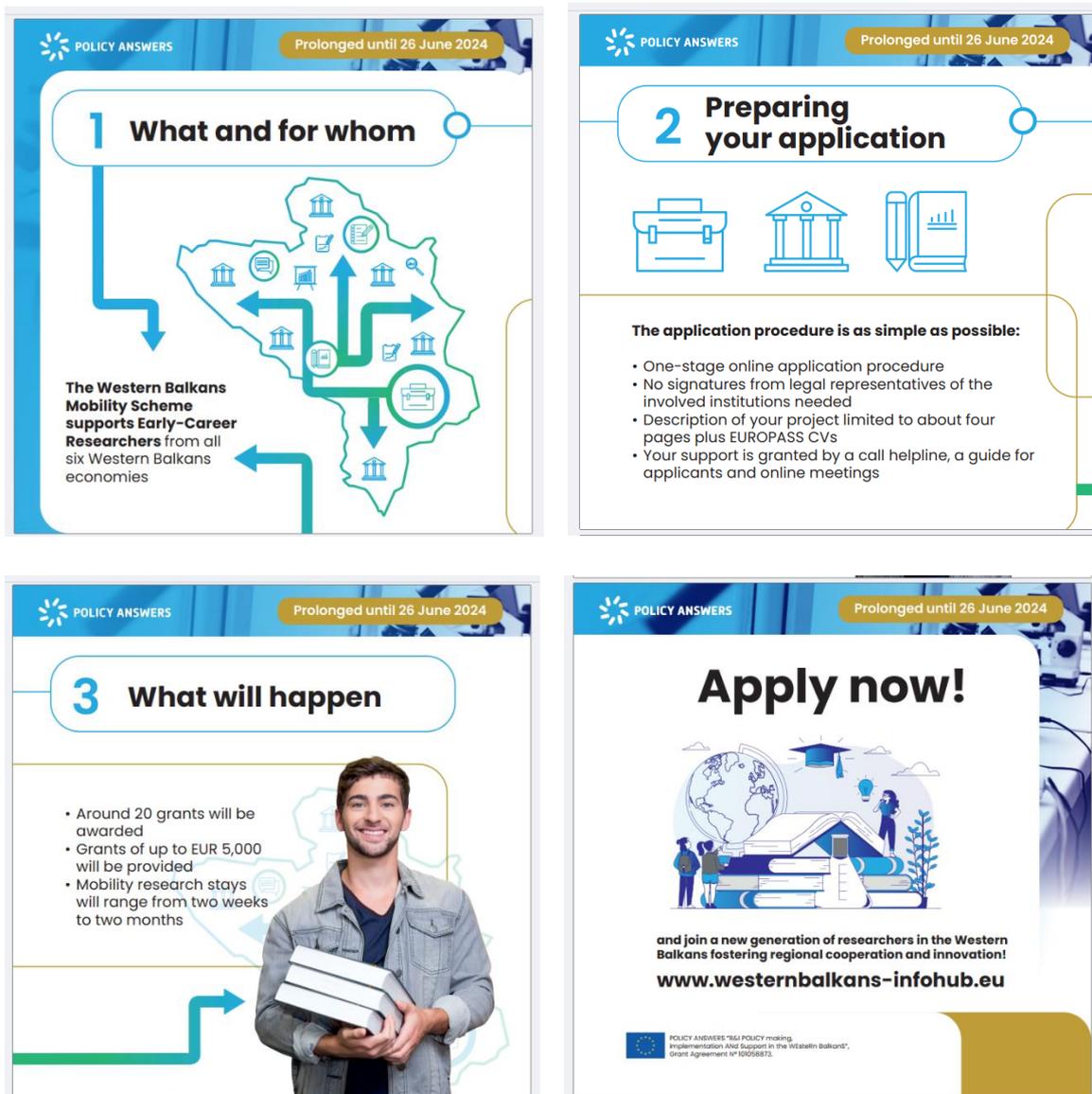
The call announcement at the Funding & Tenders Portal of the European Commission and the full call text at the project website were launched on 28 March 2024. On the basis of a dissemination and communication strategy, the launch of the call was also presented on several social media channels like X, LinkedIn, Facebook, Instagram etc. with two posts per week (eight posts per month). As the campaign approached its end and in order to once again push awareness about it, a countdown was communicated via posts (e.g. “5 more days to apply”). The social media campaign was accompanied by targeted emails to colleagues, networks, universities, research institutes, EU representatives at a local level, EU Info centres, etc.

A pre-announcement of the call - about one month in advance - had been published. The initial call deadline of 31 May 2024 was prolonged until 26 June 2024 which provided the opportunity to reinforce once more the outreach to the target group with additional promotion activities and in doing so, to increase the number of submitted applications.



Figure 1: Flyer of the WBMS

In order to promote RIs in the region and to facilitate the contacts between ECR and host institutions, further information on concrete RI in the six economies was made available at the POLICY ANSWERS website. These data were based on reports of economy-level RI roadmaps, offering the opportunity to scan the listed RI and equipment for requested types of RI like e.g. spectrometer or X-ray machine in order to make it easier for the ECR to identify an appropriate host institution offering the requested RI.



1 What and for whom

The Western Balkans Mobility Scheme supports Early-Career Researchers from all six Western Balkans economies

2 Preparing your application

The application procedure is as simple as possible:

- One-stage online application procedure
- No signatures from legal representatives of the involved institutions needed
- Description of your project limited to about four pages plus EUROPASS CVs
- Your support is granted by a call helpline, a guide for applicants and online meetings

3 What will happen

- Around 20 grants will be awarded
- Grants of up to EUR 5,000 will be provided
- Mobility research stays will range from two weeks to two months

Apply now!

and join a new generation of researchers in the Western Balkans fostering regional cooperation and innovation!

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POLICY ANSWERS "RI&I POLICY-making, Implementation and Support in the Western Balkans", Grant Agreement N° 10055873

Figure 2: Further promotion material of the WBMS

Together with the call text, the guide for applicants and the information on the RI in the region, a Q&A section was provided at the PA website. This Q&A resulted from the questions (asked by the applicants) and the corresponding answers (by the call secretariat) and were updated once a week.

The WBMS call was also presented at the Meeting of the Western Balkans Steering Platform on Research and Innovation on 27 March 2024 and at the youtube channel of the project⁶.

⁶ <https://www.youtube.com/watch?v=BSP2wwNDMgc>. Accessed on 20 January 2026.

To further support applicants, the POLICY ANSWERS team organised a webinar on 12 June 2024 in order to answer any possible question that had come up in connection with the application process, eligibility criteria and other topics of the WBMS.



WEBINAR

12 June 2024
14:00 – 15:00 CEST

Boost your Academic Career with the Western Balkans Mobility Scheme

A Q&A session will be held to discuss the application process, eligibility criteria, required documentation, etc.

Speaker
Ralf Hanatschek
WBMS call secretariat at DLR Projektträger

Join the webinar via the link provided in the description

WESTERN BALKANS Info Hub

Funded by the European Union

Figure 3: Flyer of the WBMS Webinar on 12 June 2024

3.2 Submission statistics and figures

A total of 31 applications have been submitted by 26 June 2024 (requesting a total funding sum of EUR 143,952).

Here are some further statistics:

Table 2: Distribution of applications according to economy of home institutions

Distribution of applications according to economy of home institutions					
Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
3	8	3	3	6	8

Table 3: Distribution of applications according to economy of host institutions

Distribution of applications according to economy of host institutions					
Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
4	5	2	4	3	13

Table 4: Distribution of applications according to classification of R&I

Distribution of applications according to classification of R&I					
Agricultural and Veterinary Sciences	Engineering and Technology	Humanities	Medical and Health Sciences	Natural Sciences	Social Sciences and Humanities
0	5	4	5	6	11

Table 5: Status of ECR in applications

Status of early-career researcher (ECR)	
PhD student	Postdoc
17	14

Table 6: Gender of ECR in applications

Gender of ECR	
female	male
17	14

Table 7: Experience in international research mobility of the ECR in applications

Experience in international research mobility (number of stays abroad)		
0	up to 5	more than 5
12	18	1

3.3 Eligibility check

DLR as call secretariat completed the eligibility check within two weeks after the deadline. Colleagues from the POLICY ANSWERS consortium representing all six economies supported DLR with checking the eligibility of the home and host institutions according to the respective registries on economy-level. Finally, 30 applications were found to be eligible and entered the review process.

3.4 Reviewing the applications

A guide for reviewers was prepared to instruct reviewers through the review process.

The applications underwent external remote assessment. From the pool of reviewers established, DLR assigned two reviewers to each application, external to the POLICY ANSWERS project and from outside the region. In assigning reviewers to the applications, only the best thematic fit of the evaluators was relevant. Prior to receiving applications, reviewers had to confirm they will refrain from any discrimination based on gender, nationality etc., and will indicate any potential conflict of interest immediately after receiving the application. It was intended to provide a balanced mix of reviewers according to nationality, gender and age. In addition to the application, the assessment form, the guide for reviewers and the call text were provided to the experts in digital form. The reviewers scored the applications against the assessment criteria provided in the call text.

Furthermore, the reviewer gave comments on the main strengths & major weaknesses. Scores were justified by detailed comments. In case the assessments of an applications showed high discrepancies in the total score (variation of more than five out of a total of 15 points), a third review was requested and the review which differed the most (in total score) was discarded. This was the case in seven of the 30 applications. The final picture was that from the 30 applications eligible, 26 were above threshold and therefore were recommended for funding. 49 reviewers provided a total of 67 reviews for a total remuneration of 1,675 EURO. The review process was completed on 20 August 2024.

Applications above the threshold were ranked according to their score (as the mean of the final two assessments), and placed either on the shortlist (as a funding recommendation) or on the reserve list. These lists were provided to the POLICY ANSWERS Steering Group. The lists also contained information on gender of the applicant, whether the grantee has only little or no experience in international cooperation and whether the grantee is located in a capital or not.

3.5 Meeting of the Steering Group and funding decision

The virtual meeting of the Steering Group took place on 10 September 2024. The Steering Group had two tasks: At first the Steering Group had to verify that the review process has been transparent and fair and that its results, the proposed shortlist (as a funding recommendation) and the reserve list are based on an appropriate process. Secondly, the Steering Group had to decide about applications to be funded and those to be put on the reserve list.

The Steering Group had to decide without objections. It was expected from all Steering Group members not to follow the interest of their economy or institution but to decide according to the aims of the WBMS. Therefore, adjustments of the ranking lists were only allowed if applications were located at the same rank or very close together, and based on geographical balance of the applicants (between the economies and within the economies) and/or based on inclusivity. While the geographical balance between the economies should ensure an evenly regional distribution of the selected applicants and demonstrate a regional success of the scheme, the balance within each economy should ensure that not only grantees in the capitals are supported, but also those in less developed areas of the respective economy. The aspect of inclusivity should ensure gender balance as well as benefit for ECRs with little or no experience in international mobility. Of course, also a balanced distribution regarding the key thematic priorities should be ensured.

The aim was to select a minimum of two projects per economy (focusing on the ECR's home institution), under the condition of a sufficient number and quality of applications.

Since the score of the reviewers was the most important criterion for the ranking and the selection of the applications, it was proposed by the WBMS call secretariat that the 18 best

ranked applications (out of 26 above threshold) should be accepted without further discussion. This would mobilise approximately EUR 80,000 of the available budget of EUR 100,000. Within the remaining eight applications the Steering Group finally agreed on a clear ranking without objections. The Steering Group followed with its decision in full the overall rule that adjustments of the ranking lists were only allowed if applications were located at the same rank or very close together and based on geographical balance of the applicants. In addition, it was ensured that the key thematic priorities for the region were covered by the selection and that also all six WB economies were among the target economies (host institutions) for the mobility. With regard to the budget, the ranking resulted in a list of projects to be funded comprising 22 applications mobilising a total of EUR 101,677 as well as the reserve list which contained a total of four applications. It was agreed among the POLICY ANSWERS project team, that the slight exceeding of the planned budget would not be a problem.

During the concluding discussion on strengths and weaknesses of the WBMS, the Steering Group members highlighted the regional approach - in contrast to the bilateral approach of other existing mobility schemes - and the focus on early career researchers as the most positive aspects of this scheme.

During the contract negotiations it turned out that several projects needed a smaller amount of budget than applied, so a 23rd project could be funded. Here are some figures and statistics on the 23 applications finally funded:



Figure 4: Intraregional exchange due to the 23 WBMS projects

Table 8: Distribution of projects according to economy of home institutions

Distribution of projects according to economy of home institutions					
Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
1	5	2	3	6	6

Table 9: Distribution of projects according to economy of host institutions

Distribution of projects according to economy of host institutions					
Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
2	3	2	3	2	11

Table 10: Distribution of projects according to classification of R&I

Distribution of projects according to classification of R&I					
Agricultural and Veterinary Sciences	Engineering and Technology	Humanities	Medical and Health Sciences	Natural Sciences	Social Sciences and Humanities
0	5	2	4	4	8

Table 11: Status of ECR in the projects

Status of early-career researcher (ECR)	
PhD student	Postdoc
13	10

Table 12: Gender of ECR in the projects

Gender of ECR	
female	male
10	13

Table 13: Experience in international research mobility in the projects

Experience in international research mobility (number of stays abroad)		
0	up to 5	more than 5
9	14	0

Until 30 September 2024, DLR informed all applicants individually and in writing about the assessment result and whether their application was selected for funding or not. In addition, DLR published an evaluation report on the review results on the POLICY ANSWERS website⁷, i.e. the Western Balkans Info Hub. This report comprised an account of the call, its review and its results, including dates of call, how it was published, dates of evaluation, number of proposals received, number of proposals funded, as well as a list of all selected applications and the requested budget. An overview of the 23 selected projects is provided in table 14.

⁷ <https://westernbalkans-infohub.eu/news/public-evaluation-report-results-of-the-western-balkans-mobility-scheme/>. Accessed on 20 January 2026.

Table 14: List of 23 WBMS projects

ID	Project acronym	Project title	Home institution	Economy of home institution	Host institution	Economy of host institution
WBMS-016	Waste_2_Dress	<i>Harnessing Fruit Juice Industry Waste for the Development of Cellulose Fabrics intended for Diabetic Wound Dressing</i>	Innovation Center of the Faculty of Technology and Metallurgy in Belgrade	Serbia	Faculty of Technology and Metallurgy, Ss Cyril and Methodius University in Skopje	North Macedonia
WBMS-017	PREVALT	<i>Prevention of Valproate Teratogenicity</i>	Institute for Medicines and Medical Devices	Montenegro	Faculty of Pharmacy, University of Belgrade	Serbia
WBMS-019	MEWO	<i>Preparation and characterization of tungstates and oxides semiconductor thin films</i>	Faculty of Natural Sciences and Mathematics - Skopje, Institute of Physics	North Macedonia	“Vinca” Institute of Nuclear Sciences	Serbia
WBMS-025	NUTRIBAL	<i>Diet and Health in the Balkans: Understanding Regional Nutritional Dynamics</i>	University of Donja Gorica - Centre of Excellence (FoodHub)	Montenegro	University of Belgrade, Institute for Medical Research	Serbia
WBMS-026	The Green Flow	<i>Development of Green Technology for Pesticide Removal from Wastewater Using Industrial Hemp Biomass Waste</i>	Faculty of Medicine, University of Banja Luka	Bosnia and Herzegovina	University of Belgrade, Institute of Chemistry, Technology and Metallurgy	Serbia
WBMS-030	EMERGE	<i>Empowering Sustainable Growth through Emerging Technologies in Serbia and North Macedonia</i>	International Balkan University - Skopje	North Macedonia	Institute of Economic Sciences	Serbia

WBMS-031	TRANSMEDICON	<i>Navigating Transitions: The Role of Civil Society in Reshaping Media Regulation</i>	Institute for Philosophy and Social Theory	Serbia	The Faculty of Dramatic Arts	Montenegro
WBMS-034	TransMemPhen	<i>Memories of a stressful past: Phenolic compounds in transgenerational plant stress memory</i>	Faculty of Forestry, University of Banja Luka	Bosnia and Herzegovina	Institute of Molecular Genetics and Genetic Engineering	Serbia
WBMS-035	MUCOOphth	<i>Formulation and characterization of polysaccharide mucoadhesive systems for ophthalmic drug delivery</i>	University of Banja Luka, Faculty of Medicine	Bosnia and Herzegovina	University of Belgrade - Faculty of Pharmacy	Serbia
WBMS-043	THERALU	<i>Standardization of freeze-drying formulation and accelerated stability study for ready to use protein-based Lutetium-177 radiolabeled radiopharmaceuticals</i>	Goce Delcev University, Stip	North Macedonia	Vinca Institute of Nuclear Sciences	Serbia
WBMS-046	BARGAIN	<i>Bargaining between the EU and WB gone wrong? (Balkan Accession: Realizing Goals and Addressing Integration Needs)</i>	The University of Pristina with a temporary seat in Kosovska Mitrovica	Kosovo*	Epoka University	Albania
WBMS-047	POLY-RING	<i>Investigation of fracture resistance of polymer materials using new ring samples</i>	Innovation center of the faculty of Mechanical Engineering	Serbia	University of Montenegro, Faculty of Mechanical Engineering	Montenegro
WBMS-056	SKILLED-SMEs	<i>Firm-level hiring difficulties in manufacturing SMEs due to skills shortage: the role of migration, firm characteristics, and</i>	South East European University	North Macedonia	The University of Prishtina "Hasan Prishtina"	Kosovo*

		<i>growth expectations</i>				
WBMS-057	MPSM	<i>Monetary Policy and Regional Stock Exchanges: The Case for Market Regionalization</i>	University American College Skopje	North Macedonia	University of Sarajevo	Bosnia and Herzegovina
WBMS-061	<i>Fusion of Art and Urban Soundscapes in the Western Balkans</i>	<i>Artistic Acoustic Textiles: Fusion of Art and Urban Soundscapes in the Western Balkans</i>	POLIS University, International School of Architecture and Urban Development Policies	Albania	Akademia Evolucion:	Kosovo*
WBMS-064	IIREJSIC 1941-1943	<i>Italian Rescue Efforts and Jewish Salvation in the Independent State of Croatia 1941-1943</i>	University of Banja Luka	Bosnia and Herzegovina	Institute for Contemporary History	Serbia
WBMS-067	GI-BBB-HM-AD	<i>In vitro Estimation of Passive Gastrointestinal (GI) Absorption and Blood-Brain Barrier (BBB) Permeability of Novel Coumarin-1,2,3-Triazole-Isatin Hybrid Molecules as Potential Alzheimer's Disease Drug Candidates</i>	Ss. Cyril and Methodius University in Skopje	North Macedonia	University of Belgrade, Faculty of Pharmacy.	Serbia
WBMS-071	UV-EMBAI	<i>Exploring the Uncanny Valley: Connotative Meanings and Physiological Parameters as Correlates of Preferences for Embodied AI Agents Across Varying Degrees of Anthropomorphism</i>	University of Nis, Faculty of Philosophy	Serbia	Faculty of Philosophy University of Banja Luka	Bosnia and Herzegovina

WBMS-072	GreenMembranes	<i>Green and Sustainable Membrane Roofs and Their Impact to Surroundings</i>	Faculty of Civil Engineering and Architecture of the University of Niš	Serbia	Faculty of Civil Engineering of the University of Montenegro	Montenegro
WBMS-076	HERIWB	<i>Cultural heritage for the Western Balkans: Between Technology, Archeology and Tourismology</i>	University of Montenegro	Montenegro	University of Tirana	Albania
WBMS-082	ReCMARES	<i>Real-Time Control of Microgrid Assets Incorporating Renewable Energy Sources</i>	University of East Sarajevo, Faculty of Electrical Engineering	Bosnia and Herzegovina	University of Belgrade	Serbia
WBMS-087	DUI - UP - SEEU	<i>Green Transformation Policies in North Macedonia: potential lessons and relevant experiences for Kosovo</i>	University of Prishtina	Kosovo*	South East European University	North Macedonia
WBMS-088	NEUROAMB	<i>Ambiguity intolerance, neurophysiological reactions to ambiguous affective stimuli, anxiety, and resilience in physical education students</i>	University of Niš, Faculty of Philosophy	Serbia	University of Banja Luka, Faculty of Physical Education and Sport	Bosnia and Herzegovina

3.6 Contracting, administrating and reporting of the projects

The selected applicants were contracted by the DLR between September and November 2024. As call secretariat, DLR managed the funds. The financial support was given on the basis of a bilateral contract between the DLR and the grantee, i.e. the ECR. Letters of Confirmation of the respective home and the host institutions - signed and stamped by the respective legal representative of these institutions - were integral part of the agreement. The involvement of the home institution was necessary, since it had to confirm that the grantee is affiliated to them and that they were aware of the project and had no objections. Additionally, the home institution should confirm that the grantee will be able to return to his/her workplace after the project, and to apply the new knowledge for the benefit of both him-/herself and the home institution. The involvement of the host institution was necessary, since it had to confirm that

the RI could actually be used in the timeframe specified and that further support was granted - like the provision of a workplace for the grantee during his/her stay.

Written form of the contract was mandatory. The financial support contract came into effect with its signature. In order to accelerate the process, the grantee supplied DLR with a digital copy of the signed agreement. However, the grantee was obliged to submit the original document within 14 days after supplying the copy and prior to the first instalment.

Projects started between 1 October 2024 and 1 February 2025. They were completed until 30 June 2025. A slight exceeding of the maximum project duration as well as the end date by which all WBMS projects had to be completed was accepted by the projects team according to unforeseeable circumstances faced by several grantees. Further details are provided in chapter 4.2.4.

The financial support was provided in two instalments, a first share as pre-financing (75 %) within 30 days after signing the contract, second share after approval of the final report (25 %). The grantee provided one (short) report (financial and technical) about the outcome of the project and the use of the financial support within the project within a maximum of 30 days after the end of the project. The financial report contained a list of the receipts and scans of the original hard copies. The original receipts have to be kept by the grantee for a minimum of five years (due to the prescribed inspection period of the EC). In case only unit costs/lump sums have been accounted for, only a technical report was necessary. The report had also to include a standardised confirmation letter by the counsellor (mentor) of the host institution, indicating that the grantee has visited the RI, etc. The DLR audited and ensured that the financial support had been used in accordance with rules and regulations of the financial support contract. A total of EUR 92,170.57 was spent in the 23 projects. All projects were successfully terminated. An analysis of the project implementation and the reporting is given under chapter 4.2.5.

3.7 Key findings of the implementation process of the WBMS

After the implementation phase of the WBMS ended, some key results were:

- Intensive promotion activities have been carried out, with a focus on social media;
- good response of the target group of young researchers with 31 applications;
- applications covered all six WB as home as well as host institution;
- elaborate review phase with at least two reviews per application;
- good quality of the applications leading to funding recommendations for 26 applications;
- finally, 23 WBMS projects could be funded, exhausting the funding budget and again covering all six WB as home as well as host institution.

4 Evaluating the WBMS

4.1 The evaluation concept

Since the WBMS should build the ground for a follow-up of the WBMS to be funded by regional, economy-level or international stakeholders, an elaborated concept for the evaluation of the WBMS was prepared. Participation to the evaluation was obligatory for all applicants and grantees based on the specifications in the call text as well as in the application form and the contract on the provision of financial support. Additionally, three other groups have been involved on a voluntary basis, namely non-applicants (those who have registered in the CMS but not submitted an application, POLICY ANSWERS project partners (based on their experience in promoting the scheme) and external regional, economy-level and international stakeholders, who already had supported the preparation of the WBMS (see chapter 2.4).

The evaluation of the WBMS referred to five criteria for programme evaluation: Relevance, effectiveness, efficiency, impact and sustainability. These criteria were assessed regarding the aim of the scheme: First, to enhance regional cooperation and sustained support in mobility-driven R&I and - by fostering the interconnectedness of the WB - to support sustainable economic growth, a common regional market, societal resilience and convergence of the Western Balkans with the EU; and secondly the three objectives of fostering brain circulation and encourage brain retention within the WB at an early stage of the researchers' careers, of supporting excellence in research in the WB and of promoting and supporting the Open Access use of the huge amount of underused RI (facilities, resources and services) across the WB.

4.2 Evaluation steps

Data collection for the evaluation process was implemented in five steps between 26 June 2024 and 13 November 2025.

4.2.1 Application Statistics

With reference to the data in chapter 3.2 submission statistics it can be stated that with 31 applications the pilot measure proved that it addressed a relevant topic which is of interest for young researchers in the WB. However, it has to be kept in mind that this result was only possible after a prolongation of the deadline for one full month and the provision of additional promotion activities like a webinar etc. With only ten applications by the initial deadline the response would have been too low to be satisfying. But this situation also showed clearly that a good dissemination and promotion strategy is of high importance in order to reach the target group.

The data in 3.2 submission statistics very clearly show that that all six WB economies are covered by the home institutions of the ECR with applicants from Serbia and from Bosnia and Herzegovina on the first rank in terms of number of applications. However, each economy provided at least three applicants, which is an excellent result regarding the variety in number of researchers and size of innovation system within the six economies. Regarding the distribution of applications according to economy of host institutions, again all economies are represented. However, as expected we find a significant gap between Serbia and all other economies.

The respective table in chapter 3.2 on submission statistics shows a relatively even distribution of the applications across all relevant thematic areas with two remarkable exceptions: The one is that supposedly no applications in the field of agricultural and veterinary sciences have been submitted and the other is the relatively high share of applications in the field of Social Sciences

and Humanities (SSH). During the eligibility check with an in-depth analysis of the submitted applications it turned out that several applications that have been labelled with a different thematic area could also be described as agricultural and veterinary sciences. Regarding the high rate of applications in the SSH sector, it may be assumed that a very efficient promotion by motivated multipliers could be one cause.

One aspect of the WBMS was to address especially young researchers who are in the early stage of their career and who have only little experience (or none) in international research mobility. These would benefit the most from the WBMS. Application statistics show that more than half of all applicants were PhD students and that for almost 40 % of them a research stay within the WBMS would have been the first international research mobility at all. Only around 3 % of the applicants report more than 5 stays abroad.

Regarding the type of the host institution, around 70 % are Higher Education Institutions (HEIs), 23 % are labelled as public research organisations (PROs). All public or private Research Performing Organisations (RPOs) or HEIs in the WB that are registered in one WB economy under the respective law and that provide RI have been eligible as host institution for the grantee.

The quality of applications proved to be high. Out of the 31 applications only one was not eligible. Out of the 30 applications that entered the review process, a total of 26 have been above threshold indicating their recommendation to be funded.

With 31 applications submitted and 23 projects funded the success rate is around 74 %. This is a good rate, combining a slightly competitive approach with very strong motivating and positive signals. Against the background that this scheme addresses young researchers with little to no experience in competitive funding procedures it seemed to be appropriate to fund as much applicants as possible. With the 23 projects the budget was fully exhausted.

4.2.2 Survey with applicants/registered persons

A total of 72 persons (applicants and persons who had registered in the system) had been invited by 20 September 2024 to join a short survey on the WBMS with a total of 12 questions in four groups (promotion and concept, aspects of project idea, support structures and application procedures, comments). A total of 69 datasets have been received until 23 October 2024. The overall assessment was quite positive.

Regarding the promotion of the WBMS, it turned out that most of the participants (39 %) learned about the WBMS by social media channels deployed by the Western Balkans Info Hub (Facebook, X, LinkedIn, YouTube), by personal contacts (29 %) and the website of the Western Balkans Info Hub (26 %). Surprisingly, the newsletter of the Western Balkans Info Hub was of no importance (0 %). Several participants reported that they learned about the WBMS through the website of their own university.

In the survey, the concept of the WBMS was evaluated in detail. Aspects of the WBMS that were appreciated were the hassle-free and simple application process and tool, the opportunity for regional cooperation and the focus on ECRs. It was also mentioned that mobility and networking would be very essential for the career development of ECRs and that the WBMS addressed this need explicitly. In doing so the WBMS would fill a gap in the funding landscape. The mentioned aspects of the WBMS to be added or changed vary greatly, while recommendations are numerous: longer mobility periods, higher grants, support also after the implementation period of the projects, to fund also the mobility of staff of the host institution (like the counsellor) and more support during the application phase, especially information on the eligibility of costs have been mentioned. However, since all recommendations only were mentioned once, no critical mass is reached and therefore no urgent need to alter the concept significantly is seen.

Nevertheless, the recommendations should be taken into account - if possible - when a possible follow-up scheme is designed. It has also to be stated that several participants did not have any recommendations at all, they have been satisfied with the scheme as it was.

Almost all of the participants confirmed that the eligible cost categories were appropriate and around 75 % of the participants acknowledged that the amount of funding had been sufficient. However, around 10 % of the participants proposed a higher budget between EUR 7,000 and 10,000. Almost 90 % of all participants reported that the cooperation with the potential host institution during the application phase was perfect.

During the evaluation also two aspects of the ECRs' envisaged projects have been examined: 60 % of the participants started a new co-operation, meaning that the project was not based on already existing joint research activities. Regarding the question of how they found a suitable host institution, the majority reported that the host institution was already known. Others mentioned that the host institution had been identified via desk research (17 %), by receiving advice from the home institution (14 %), through the Western Balkans Info Hub website (8 %) or by other sources (8 %).

Almost 80 % rated the satisfaction with the overall support structure of the scheme as perfect. A similar good result is shown if the question focused explicitly on the website, the call text, the work of the call secretariat and the provided guidance. However, some participants recommended more detailed FAQ or more detailed guidance and hands-on assistance during the application process. All participants rated the administrative burden before submission of the application as very adequate or adequate.

4.2.3 Survey with project partners and stakeholders

All POLICY ANSWERS partners and 16 external stakeholders - who have been involved in the preparation of the WBMS (please see Table 1) - have been addressed by 31 October 2024 and asked to support the evaluation of the WBMS by completing a short questionnaire with a total of seven questions in three groups (promotion and concept; support structures and application procedures, comments). By the deadline of 22 November 2024, a total of 27 datasets have been received.

Appreciated aspects of the concept of the WBMS were the possibility for short-term networking, the focus especially on young researchers as target group and that it offered a unique opportunity for funding in the region.

As aspects of the WBMS to be added or changed it was recommended to broaden the scheme to other economies, to increase the promotion activities in order to improve visibility and to address a broader group of researchers (active in NGOs, private universities, businesses etc.) to support them to steer their work towards the academic side.

The vast majority (80 %) of the participants confirmed that the eligible cost categories were appropriate. However, more flexibility within the cost categories and the opportunity to fund also the efforts of the host institution have been recommended. Likewise, 80 % of the participants acknowledged that the amount of funding had been sufficient.

All participants rated the satisfaction with the overall support structure of the scheme as perfect or good. A similar good result is shown if the question focused explicitly on the website, the call text, the work of the call secretariat and the provided guides. It was recommended to work with Horizon Europe NCPs in each of the economies to improve the support structures.

As a general comment it was encouraged to prepare success stories in order to help potential applicants envision the opportunities available and feel inspired to apply for next calls.

4.2.4 Implementation of projects

The 23 projects were implemented between 1 October 2024 and 30 June 2025. The overall length of the research projects' duration varied between one and six months, with the majority of 17 out of 23 projects being implemented within six months. The length of the research stays

abroad varied between a minimum of 14 and a maximum of 64 days within the 23 projects. The mean number of days spent abroad per project was 26. A total of EUR 92,170.57 was spent for all 23 projects, resulting in a mean grant of EUR 4,007.42 per project.

Project implementation was relatively smooth. Two points turned out to be tricky: First, although it was initially planned that no extension of the project would be accepted - for pedagogic reasons and explicitly laid down in the financial support contracts - in few cases prolongations have been made. In each case the reason was beyond the power of the grantee and the extension was necessary in order to reach the objective of the project, e.g. some grantees faced significant organisational challenges at their home institution in Serbia, due to ongoing student protests and broader social unrest. These circumstances disrupted regular academic workflows and contributed to delays in the progress. Secondly, the relatively short project durations conflicted with the time required for some of the promotion activities, especially with the relatively long periods necessary for publishing of scientific articles. Usually, only costs could be accepted that appeared within the project duration. In case of publishing the project results in peer-reviewed journals, the costs mostly occurred several months after the termination of the project. Finally, in all cases the costs have been accepted since the promotion of the project results and the support of the career development of the ECR was of high importance for the WBMS.

4.2.5 Exploitation of project results

As learned from the factual (technical) project reports, all 23 projects succeeded in reaching their project objectives. The exploitation of the project results is rather impressive - especially if taken into account the limited budget invested and the early stage in the scientific career of the grantees: A total of 20 articles for conference proceedings have been accepted, or conference lectures given, 15 papers have been submitted in peer reviewed scientific journals out of which seven already have been accepted or were even published. In four WBMS projects the results already have been presented to scientific institutions other than the home or host institution.

From the multitude of exploitation measures some are especially worth to be mentioned: The project WBMS-016 “Harnessing Fruit Juice Industry Waste for the Development of Cellulose Fabrics intended for Diabetic Wound Dressing” successfully participated in the research category of the Global Chemical Leasing award 2025⁸ (by United Nations Industrial Development Organisation & Austrian Federal Ministry of Agriculture and Forestry, Climate- and Environmental Protection, Regions and Water Management, see Figure 5). In addition, the grantee promoted the results at a company in Austria.



Figure 5: Certificate of the Global Chemical Leasing award 2025 for WBMS-016

⁸ <https://www.fecc.org/event/the-global-chemical-leasing-award-2024-2025/>. Accessed on 20 January 2026.

In project WBMS-061 “Artistic Acoustic Textiles: Fusion of Art and Urban Soundscapes in the Western Balkans” Esmeralda Marku from Albania established a prototype at the host institution “University Akademia Evolucion” in Kosovo. The prototype - transforming spaces into immersive and more peaceful environments - was realised with the textile weaving with wool fibers. Several policy briefs have been prepared and distributed; the project results prepared the basis for applications in Erasmus+ Capacity Building in Higher Education (CBHE) programmes and with European Cooperation in Science and Technology (COST) Actions, as well as in national programmes like the Serbian Fund for Science; project results were presented at a workshop of a Horizon Europe project; a Memorandum of Understanding (MoU) was signed between the host and the home institution as consequence of the cooperation in the WBMS, etc.



POLICY BRIEF
NUTRIBAL – DIET AND HEALTH IN THE WESTERN BALKANS

Funded by the European Union

Common Availability, Diverging Dietary Patterns

Dietary habits in the Western Balkans are at a crossroads between tradition and emerging health risks. Data from the EFSA EU Menu and FAOSTAT analyses reveal that while Albania, Bosnia and Herzegovina, Croatia, Montenegro, and Serbia maintain sufficient dietary energy supply, their food systems are increasingly characterized by high intake of refined cereals, added sugars, and fats—and low intake of fruits, vegetables, fish, and legumes. These shifts reflect a regional move away from health-supportive traditional diets and highlight the urgent need for coordinated nutrition policies.

Key Findings

- **Macronutrient supply is adequate but imbalanced**
 - Montenegro and Serbia reported the highest energy and fat availability (>3,400 kcal and >120 g fat per capita/day). Bosnia and Herzegovina lags behind in all macronutrients.
- **Cereals dominate daily energy intake**
 - In Albania, cereals make up over 50% of caloric supply. Other countries range between 40–47%, indicating low dietary diversification.
- **Fats and sugars rising across the region**
 - Vegetable oils and sweeteners each account for 10–18% of dietary energy. Added sugar supply exceeds WHO thresholds in all countries.
- **Protective food groups are underrepresented**
 - Vegetables, fruits, legumes, and fish combined contribute less than 10% of energy in most countries. Fish is particularly neglected, with 0% share except in Albania.
- **Regional convergence with dietary Westernization**
 - Traditional food patterns are eroding across all five countries, replaced by energy-dense, nutrient-poor diets.

Health Implications

- The observed patterns contribute to a rising burden of noncommunicable diseases (NCDs) in the Western Balkans.
- High fat and sugar availability, coupled with low fiber and micronutrient density, align with WHO-reported trends in obesity and cardiovascular risk. Traditional Mediterranean elements—once central to regional diets—are fading, particularly among youth.

Policy Recommendations

- **Reform food supply priorities**
 - Reduce reliance on cereals and fats by supporting access to nutrient-dense foods.
- **Introduce fiscal incentives**
 - Promote local production and consumption of legumes, vegetables, and fish through subsidies and institutional procurement policies.
- **Strengthen school and institutional meals**
 - Ensure regular inclusion of fresh vegetables, pulses, whole grains, and seasonal foods.
- **Improve transparency and consumer awareness**
 - Mandate front-of-pack labels indicating levels of added sugars, fats, and salt.
 - Conduct public campaigns highlighting benefits of traditional, plant-rich diets.
- **Establish national dietary monitoring systems**
 - Implement regular individual-level dietary intake surveys and integrate them with health and food security planning.

Why This Matters Now

The Western Balkans face a unique window of opportunity to act before poor diets become normalized. FAOSTAT data highlight the early stages of a nutrition transition—still reversible through informed, timely action. By aligning food, agriculture, and health policy, countries can reinforce traditional dietary strengths while addressing emerging risks of NCDs.

Acknowledgement

This policy brief has been prepared within the project “NUTRIBAL – Diet and Health in the Balkans” (WBMS-025), implemented under the Western Balkans Mobility Scheme - A POLICY ANSWERS Pilot Programme. The views expressed herein are those of the author and do not necessarily reflect those of the funding body or affiliated institutions.

01/02

02/02

Figure 6: Policy Brief of WBMS-025: Diet and Health in the Balkans: Understanding Regional Nutritional Dynamics

The exploitation of the project results is not yet terminated. Further papers to be submitted, conferences to be participated in, podcasts to be recorded etc. are in planning for the time after the end of the WBMS projects.

4.2.6 Host institutions and RI

Regarding the host institutions 16 were higher education institutions and seven were PROs. An analysis of the factual reports of all projects revealed that regarding the type of RI used, the majority (12) belonged to laboratories, technical equipment or machines like a Fourier-Transform-Infrared spectroscope or benchmark power grids. In seven projects databases and software licences needed to analyse these data attracted the ECRs. In two cases libraries have been named as RI addressed. And in further two cases specific research objects provided at the

host institution has been named as reason for the cooperation. Here the vague definition of RI within the WBMS came to its limits.

In addition to the access to RI it was of crucial importance that the ECRs also benefited from training and hands-on experience given by the counsellor and other staff at the host institution. In many reports the close cooperation with the experienced counsellor at the host institution and the practical training were seen to be of high importance for the ECR's career.

4.2.7 Exit survey & focus group

4.2.7.1 Exit Survey

All 23 grantees had been invited by 25 September 2025 to join a short exit survey on the WBMS with a total of 21 questions in seven groups (concept of WBMS; co-operation with host institution; skill development; access to RI; project results; sustainability; recommendations). A total of 22 datasets have been received until 11 October 2025.

The overall assessment was excellent. However, the design of some of the questions turned out to be misleading for some participants so that scale has been used invertedly, which means that the highest rating was taken for the lowest and vice versa. These cases could be identified easily and have been excluded from the analysis. The overall satisfaction of the grantees with all aspects of the WBMS (precisely: administrative level in general, application procedure, communication with funders, support from and coordination with the host institution, support from and coordination with the sending institution, research results achieved, professional contacts established) ranged between 1 and 1.25 with 1 representing "very satisfied" and 5 "very dissatisfied". According to the excellent rating no comments on what to improve were given.

The overall satisfaction regarding the appropriateness of the provided cost categories was good to excellent. The grantees made no use of the opportunity to provide additional cost categories. However, the purchase of books, equipment or software licences - as proposed by one grantee - still is problematic, especially due to the very short project duration of only few months.

All grantees were convinced that the host benefitted from the presence of the grantee due to new ideas, knowledge, training, access to the skills of the ECR etc.

Regarding the type of skills, the grantees developed during the mobility stay, the most frequently named were the networking and collaboration skills (20 out of 22). 14 grantees each confirmed that the mobility improved their use of specific equipment and techniques as well as their technical and methodological skills. Nine grantees each are convinced that the project enhanced their communication and presentation as well as their publications skills. With five clicks each at the bottom end of the list are the skills for data management and digital tools, or project management respectively. With regard to the extent to which the mobility stay has improved the grantees' overall skills, the mean result was 1.45 with 1 representing "very high extend" and 5 representing "not at all". A noteworthy comment of one grantee was: "Two major challenges for early-career scholars in the Western Balkans are fragmented networking infrastructure and relatively high open-access article processing charges. The programme helps on both fronts."

The grantees rated the extent to which the WBMS gave the grantees access to RI they could not access at home in the mean with a 1.3 (again with 1 representing "very high extend" and 5 "not at all"). The grantees confirmed that the infrastructures needed for their research project had been available and usable during their stay to a high extent (1.2). One grantee remarked: "All necessary infrastructure was provided [...] However, [...] the most valuable aspect was engaging with colleagues, and exchanging ideas with students during my guest lecture." No grantee indicated any barriers in accessing the infrastructures - neither technical, nor administrative,

nor linguistic, nor cultural. The question “Would you have visited the host institution with its RI without the WBMS?” produced very balanced results - yes: 6, no: 6, uncertain: 10.

Apart from two grantees all others confirmed that the WBMS provided an added value for their research. The two grantees are uncertain. The answers given on the question “What was the added value of staying in another WB economy for your project?” are diverse. Here is a selection of the most significant:

- “Time dedicated to research only”;
- “Staying in another Western Balkan economy added significant value to my project. It provided access to new research environments, expertise, and equipment that were not available in my home institution. The collaboration also helped build regional partnerships, exchange knowledge, and strengthen future research opportunities.”;
- “I had an excellent training to work with open sources of radiation, which helped me improve my skills. I met another PhD student, with whom we shared experience in publishing academic papers in journals and presenting the results.”;
- “This experience strongly encouraged me to deepen my exploration of advanced textile technologies, which is essential for the further development of the Fashion industry.”
- “The mobility period contributed to my professional development by expanding technical skills, strengthening international networks, and increasing scientific visibility. It also laid the foundation for future joint activities, such as co-supervision of students and shared research facilities. I contributed to the host institution’s academic community by serving on the scientific committee of the GREEN CIRC 2025 conference.”

The extent to which the mobility stay improved the career prospects of the grantees is rated high to very high (1.45) with 1 representing “very high extend” and 5 “not at all”. All grantees feel more motivated to pursue their research career within the Western Balkans region after the WBMS experience and agree that the WBMS facilitated new funding opportunities or project ideas. The sustainability of the cooperation established within the project is rated high (1.2, again with 1 representing “very good” and 5 “not good at all”). All grantees answered the question: “Would you recommend participation in future rounds to colleagues?” with “yes”.

In the last block of the exit survey the grantees were asked for recommendations and improvements of the WBMS. While several grantees indicated that the WBMS as it works perfectly for them, some others recommend increasing budget and project duration, to allow also mobility stays to more than one WB economy or to make the application and reporting process more efficient and user-friendly. Meetings for all grantees were also mentioned as an WBMS alumni database. When asked for similar funding schemes and their strengths, the grantees referred to several programmes:

- Short-Term Scientific Mission (COST actions): Here the grants are lower, and you need an underlying COST Action, but the administrative procedures are known to be very simple;
- The Western Balkans Visegrad Fellowship Program: This programme supports lecturers, researchers & scientists in two directions: citizens of Visegrad countries (Poland, Czech Republic, Hungary or Slovakia) can apply to relevant institutions in the WB economies, and citizens of the WB economies can apply to relevant institutions in Visegrad countries. Support of EUR 500 per week plus travel grant with a duration of 2-10 weeks: This is an interesting model but does not support intra-regional mobility within the WB;
- Horizon Europe - Marie Skłodowska-Curie Actions (MSCA): Different approach, much larger, more complex, much higher budget;
- Regional Network of Centres for Advanced Studied In Southeast Europe (RECAS) Fellowships: Limited to a specific topic in the field of SSH & arts with focus on SEE.

4.2.7.2 Focus group

On 13 November 2025 from 10:00 to 11:15 CET a virtual Evaluation Focus Group Meeting took place. Its task was to discuss on the strengths, weaknesses, opportunities and threats of the WBMS. Due to the limited number of ten participants, it was possible to focus more on the personal experiences and recommendations of the grantees as well as the counsellors in an interactive way providing more in-depth analysis due to an interactive format. The results are summarised according to the four aspects below.

Strengths

The grantees welcomed the broad definition of research infrastructure which allowed a variety of different projects and that the smart application procedure and the high level of digitalisation in the application and the administration phase of the WBMS reduced the administrative burden for applying and implementing a WBMS project. Furthermore, the grantees highlighted that the WBMS was a good opportunity to fulfil the requirements of a PhD-study in the field of mobility. It was appreciated that the funding comprised mobility as well as the exploitation of the results. The counsellors completed that the crucial key for cooperation is funding. The WBMS provided funding to the grantees which thereby enabled the cooperation. As further strengths the counsellors identified the flexibility in spending of the funds and the cross-border aspect of the cooperation, which opened-up the dimension of cooperation.

Weaknesses

As biggest weakness of the WBMS the participants identified the too short maximum project length of six month - here at least a maximum project duration of 12 months was recommended in order to have enough time for a comprehensive exploitation of the project results (especially the publication of scientific papers). In addition, it was suggested to increase the maximum amount of funding of EUR 5,000 in order to have more budget for appropriate publications in scientific journals with open access policy and high impact factor. One grantee criticised that the lack of reference projects made it difficult for applicants to imagine possible project approaches.

Opportunities

It was mentioned that - depending on the respective WB economy- WBMS offered a unique opportunity for mobility funding, since not in all WEB scholarships exist for that purpose. In addition, it was stated that the individual funding on the level of the Early-Career Researcher (grantee) made the programme open to all grantees without further (e.g. institutional or group) prerequisites. The majority of the PhD students in the WB carry out their studies by private funds. One grantee underlined that the limitation to regional mobility highlighted the benefits and opportunities of research cooperation in the direct vicinity of the home institution. Furthermore, it was stressed that the opening up of the access to research infrastructure to students from abroad is not a big problem in the WB, it is more to have the funds to cover the costs for carrying out the experiments e.g.

Threats

In order to make the cooperation between home and host institution more sustainable it was recommended to provide small flexible follow-up projects. One grantee stressed that the sustainability of the cooperation depends also on the involved institutions, not only on the grantees and counsellors.

4.3 Analysis by evaluation criteria

4.3.1 Relevance

The “relevance” criterion focuses on the scheme’s design. It refers to the extent to which the objectives and design of the scheme are consistent with the regional requirements, needs, priorities and policies of beneficiaries and stakeholders.

It can be stated that the objectives as well as the design of the WBMS have met the needs of the region to a high extent. This is ensured due to the well-grounded approach for the design of the WBMS, not only referring to the consideration of the analysis of mobility patterns in the WB carried out by the ISF (please see 2.1) and the alignment with political strategies (like the Berlin Process⁹) but also due to the comprehensive involvement of the region itself - e.g. in the Workshop on Mobility (please see 2.3), by consulting the POLICY ANSWERS partners and additional external stakeholders (please see 2.4).

In addition, it could be stated that with 31 applications the pilot measure proved that it addressed a relevant topic which is of interest for young researchers in the WB. Nevertheless, the evaluation also showed clearly that a good dissemination and promotion strategy is of high importance in order to reach the target group. The full coverage of all six WB economies as home institution of the ECR as well as host institutions is a clear sign that the design - among others also the broad definition of RI - was made well, so that neither the heterogenous distribution of RI across the WB nor the different sizes of the respective scientific community led to significant bias in applications or projects. However, of course Serbia is the WB economy that hosted the most ECRs, but all other WB economies were addressed also.

The respective table in chapter 3.2 (submission statistics) showed a relative even distribution of the applications across all relevant thematic areas with the two remarkable exceptions: The lack of applications in the field of agricultural and veterinary sciences and a relatively high share of applications in the field of SSH. Even with these light biases (please see explanations in 4.2.1) it could be stated that the scheme managed to stimulate applications in almost all areas. This is especially remarkable since it could be assumed that RI are very unevenly distributed over the different thematic research areas.

One aspect of the WBMS was to address especially young researchers who are in the early stage of their career and who have only little experience in international research mobility. These would benefit the most from the WBMS. Application statistics show that more than the half of all applicants are PhD students and that for almost 40 % of them a research stay within the WBMS would have been the first international research mobility at all (please see 3.2). The numbers for the selected projects are very much the same (please see 3.5). From this we can derive, that the WBMS design met the needs of the target group very well.

The direct assessment of WBMS by the applicants and the grantees is overall very positive (please see 4.2.2 and 4.2.3). As for concrete aspects of the WBMS that were appreciated, the hassle-free and simple application process and tool, the opportunity for regional cooperation and the focus on ECR were listed. It was also mentioned that mobility and networking would be very essential for the career development of ECR and that the WBMS addressed this need explicitly. In doing so the WBMS would fill a gap in the funding landscape. This impression is supported by the statements of the grantees in chapter 4.2.7 on similar programmes.

The mentioned aspects of the WBMS to be added or changed vary greatly, but no critical mass for clear recommendations could be reached. Almost all of the applicants and grantees confirmed that the eligible cost categories were appropriate and around 75 % of the participants acknowledged that the amount of funding had been sufficient. However, around 10 % of the

⁹ <https://www.berlinprocess.de/>. Accessed 21 January 2026.

participants proposed a higher budget, i.e. between EUR 7,000 and 10,000. The wish for a higher budget, but also for a project duration exceeding six months also came up in the exit survey among the grantees (please see 4.2.7.1) as well as in the focus group meeting (please see 4.2.7.2). Here a minimum project duration of twelve months was recommended. The last point seems to be motivated mainly by the better opportunities for an exploitation of the project results already during the lifetime of the project. However, the majority of the applicants as well as the grantees seem to be very satisfied with the design of the WBMS. Especially for a pilot measure like the WBMS this is an important result. 90 % of all grantees confirmed that the WBMS provided an added value for their research.

Almost 80 % of the applicants rated the satisfaction with the overall support structure of the scheme as perfect. A similar good result is shown if the question focused explicitly on the website, the call text, the work of the call secretariat and the provided guidance.

The POLICY ANSWERS project partners and stakeholders (please see 4.2.3) appreciated the concept of the WBMS for the possibility for short-term networking, its focus especially on young researchers as target group and that it offered a unique opportunity for funding in the region. As for aspects of the WBMS to be added or changed, it was recommended to broaden the scheme to other countries, to increase the promotion activities in order to improve visibility and to address a broader group of researchers (active in NGOs, private universities, businesses etc.) to support them to steer their work towards the academic side.

4.3.2 Effectiveness

“Effectiveness” refers to the extent to which the scheme has achieved its objectives. As mentioned in the call text, the aim of this scheme is to enhance regional cooperation and sustained support in mobility-driven R&I and - by fostering the interconnectedness of the WB - to support sustainable economic growth, a common regional market, societal resilience and convergence of the WB with the EU. These aims should be achieved by three objectives:

- Fostering brain circulation and encourage brain retention within the WB at an early stage of the researchers’ careers;
- Support excellence in research in the WB;
- Promoting and supporting the Open Access use of the huge amount of underused research infrastructure (facilities, resources and services) across the WB.

4.3.2.1 Brain circulation

With 23 ECRs - 13 PhD students and 10 early Postdocs - who travelled to another economy in the WB in order to do research, the WBMS definitely fostered brain circulation and encourage brain retention within the WB at an early stage of the researchers’ careers. Statistics in chapter 3.5 show that for nine ECRs a research stay within the WBMS was the first international research mobility at all, the remaining 14 ECRs indicate that their experience in international research mobility is also low, with up to five stays abroad. As mentioned in chapter 4.2.4 the length of the research stays abroad varied between a minimum of 14 and a maximum of 64 days within the 23 projects. The mean number of days spent abroad per project was 26. With these numbers, the stay abroad indicted to be of significant duration.

All grantees feel more motivated to pursue their research career within the Western Balkans region after the WBMS experience and agree that the WBMS facilitated new funding opportunities or project ideas (please see 4.2.7.1).

4.3.2.2 Excellence in research

The 23 WBMS projects support excellence in research in the WB in many ways. On the one hand - and as the analysis of the project reports clearly showed - all projects succeeded in reaching their project objectives. On the other hand (please see 4.2.5) the exploitation of the project

results is rather impressive: A total of 20 articles for conference proceedings have been accepted or conference lectures given, 15 papers have been submitted in peer reviewed scientific journals out of which seven already have been accepted or already published. In four WBMS projects the results already have been presented to scientific institutions other than the home or host institution. From the multitude of exploitation measures some are especially worth to be mentioned: One project successfully participated in the Global Chemical Leasing award¹⁰ 2025 (by United Nations Industrial Development Organisation & Austrian Federal Ministry of Agriculture and Forestry, Climate- and Environmental Protection, Regions and Water Management) and promoted the results at a company in Austria; a prototype has been established, several policy briefs have been prepared and distributed etc. For further details please see chapter 4.2.5. With regard to the short project duration between one and six months (with the majority of 17 out of 23 research projects being implemented within six months) and the early stage in the scientific career of the grantees, the results are striking. The extent to which the mobility stay improved the career prospects of the grantees is rated high to very high by the grantees themselves.

Almost all grantees confirmed that the WBMS provided an added value for their research. Regarding the type of skills the grantees developed during the mobility stay, the most frequently named by the grantees were the networking and collaboration skills and the skills needed to use of specific equipment or techniques as well as their technical and methodological skills (please see 4.2.7.1 for details). With regard to the extent to which the mobility stay has improved the grantees overall skills, the mean result was 1.45 with 1 representing “very high extend” and 5 “not at all”.

It should be noted that already the quality of the applications proved to be high. Out of the 31 applications only one was not eligible. Out of the 30 applications that entered the review process, a total of 26 have been above threshold indicating their recommendation to be funded. With 31 applications submitted and 23 projects funded the success rate is around 74 %. This is a good rate, combining a slightly competitive approach with very strong motivating and positive signals. Against the background that this scheme addresses young researchers with little to no experience in competitive funding procedures it seemed to be appropriate to fund as much applicants as possible.

4.3.2.3 Open Access use

It was also a dedicated objective of the WBMS to promote and support the Open Access use of the big number of underused research infrastructure (facilities, resources and services) across the WB. Regarding the host institutions visited by the ECR, 16 were higher education institutions and seven were public research organisations.

Regarding the question of how grantees found a suitable host institution, the majority reported that the host institution was already known. Others mentioned that the host institution had been identified via desk research (17 %), by receiving advice from the home institution (14 %), through the Western Balkans Info Hub website (8 %) or by other sources (8 %).

An analysis of the factual reports of all projects revealed that regarding the type of RI used, the majority (12) belonged to laboratories, technical equipment or machines like a Fourier-Transform-Infrared spectroscope or benchmark power grids. In seven projects databases and software licences needed to analyse these data attracted the ECRs. In two cases libraries have been named as RI addressed. And in further two cases specific research objects provided at the host institution has been named as reason for the cooperation. Here the vague definition of RI within the WBMS came to its limits. However, the benefit that RI in all WB have been addressed within the WBMS demonstrated that the vague definition of RI was right. Nevertheless - and as lesson learned - in any follow-up scheme the description of the dedicated RI and its necessity for

¹⁰ <https://www.fecc.org/event/the-global-chemical-leasing-award-2024-2025/>. Accessed 21 January 2026.

the research activities carried out in the project should be described explicitly in the application form in order to ensure that genuine RI were targeted by the ECRs.

In addition to the access to RI, it was of crucial importance that the ECRs also benefited from training and hands-on experience given by the counsellor and other staff at the host institution. In many reports the close cooperation with the experienced counsellor at the host institution and the practical training were seen as of high importance for the ECR's career.

WBMS grantees rated the extent to which the WBMS gave them access to RI they could not access at home in the mean with a 1.3 (again with 1 representing "very high extend" and 5 "not at all"). The grantees confirmed that the infrastructures needed for their research project had been available and usable during their stay to a high extend. No grantee indicated any barriers in accessing the infrastructures - neither technical, nor administrative, nor linguistic, nor cultural.

The question "Would you have visited the host institution with its RI without the WBMS?" produced very balanced results - yes: 6, no: 6, uncertain: 10. This result is a bit confusing, since it contradicts several other answers that indicate the gap in funding measures that was filled by the WBMS.

All grantees were convinced that the host benefitted from the presence of the grantee due to new ideas, knowledge, training, access to the skills of the ECR etc.

In the focus group meeting, it was stressed that the opening up of the access to research infrastructure to students from abroad is not a big problem in the WB, it is more to have the funds to cover the costs e.g. for carrying out experiments.

4.3.3 Efficiency

The criterion "Efficiency" describes the extent to which the WBMS delivered results in an economic and timely way.

Regarding the output, it could be stated that with 23 ECRs who travelled to another economy in the WB, the budget of the WBMS of EUR 100,000 was fully exhausted. So, the output was perfect. However, as presented in detail in 4.2.1, the meaning of a consistent and comprehensive dissemination and promotion strategy is of high importance in order to reach the target group, so that a sufficient number of applications could be achieved.

Due to the low mean funding sum of around EUR 4,370 (with a maximum funding sum of EUR 5,000) a total of 23 ECRs could be funded, which is a relatively high number of beneficiaries compared to the limited budget.

Also, with regard to the vast and diverse exploitation of the research results, the satisfaction of the grantees with the WBMS in general and with especially concerning the support of their skills and careers the investment of a limited budget of EUR 100,000 seems to be very efficient.

Although the administrative procedures have been tailor-made especially for the WBMS - and are as such also a pilot - the overall satisfaction with the administrative efforts by the applicants and the grantees was relatively high. The smart application procedure and the high level of digitalisation in the application and the administration phase of the WBMS that reduced the administrative burden for applying and implementing a WBMS project was also mentioned clearly as a strength of the WBMS in the focus group meeting. Nevertheless, the administrative procedures - especially regarding the financial reporting - offer room for further improvements.

The intensive evaluation process should make it easy and efficient to learn from the WBMS in every aspect and to come up with a well-founded follow-up measure.

Apart from the necessary prolongation of the deadline of the call for around four weeks, all other planned dates in the implementation of the WBMS have been met. All factual and financial reports were received in due time.

4.3.4 Impact

Based on recognisable higher-level development changes, the criterion of “impact” relates to the extent to which the WBMS has already produced significant positive or negative, intended or unintended results at the overarching level or is expected to do so in the future. This criterion would thereby address the aims of the WBMS, which are to enhance regional cooperation and sustained support in mobility-driven R&I and - by fostering the interconnectedness of the WB - to support sustainable economic growth, a common regional market, societal resilience and convergence of the WB with the EU. This is very difficult to assess. While it seems obvious that the WBMS enhanced regional cooperation and sustained support in mobility-driven R&I - because that is exactly what the WBMS has been done - and in doing so also fostered interconnectedness of the WB, it is practically impossible to assess to which extent the WBMS supported sustainable economic growth, a common regional market, societal resilience and convergence of the WB with the EU. With a budget of EUR 100,000 it could not be assumed to deliver recognisable and measurable development changes at that level.

4.3.5 Sustainability

The “sustainability” criterion relates to continued long-term benefits or the probability of continued long-term benefits over time of the WBMS, particularly after assistance has ended. Although beyond quantification, it lies in the nature of these mobility projects that new cooperations have been established, existing one have been consolidated. In addition, many grantees indicated in their factual reports that the exploitation of the project results is still ongoing. Further papers to be submitted, conferences to be participated, podcasts to be recorded etc. are in planning for the time after the end of the WBMS projects. So, on the level of the grantees as well as the involved home and host institutions we could assume some kind of continued long-term benefits.

Furthermore, the promotion about the WBMS in general and the successful exploitation of the project results as success stories in particular demonstrated not only the scientific excellence of ECRs in the WBs but also the attractiveness of the region as location for excellent research - e.g. indicted by the huge number of accepted or already published papers in peer reviewed scientific journals. This visibility might lead not only to increased cooperations within the region but also on the European level.

The sustainability of the cooperation established within the project is rated high (1.2 with 1 representing “very good” and 5 “not good at all”) by the grantees. All grantees answered the question: “Would you recommend participation in future rounds to colleagues?” with “yes”.

However, during the focus group meeting it became clear that the sustainability of the cooperation depends also on the involved institutions, not only on the grantees and counsellors.

4.4 Key findings of the evaluation process of the WBMS

During the evaluation phase of the WBMS, the following insights were gained:

- It could be stated that the objectives as well as the design of the WBMS have met the needs of the region to a high extent: 31 applications have been submitted, coverage of all six WB as home and host economy and a very positive assessment of the WBMS by the young researchers themselves;
- the alignment with political strategies (like the Berlin Process), building on preparatory activities, finding a niche with regard to other funding programmes and the comprehensive involvement of the region itself within the preparation and the promotion process contributed to the success of the WBMS;

- a comprehensive dissemination and promotion strategy has to be regarded of high importance in order to reach the target group;
- key recommendations by the grantees for a follow-up measure were the wish for a higher budget in order to improve the exploitation of the project results (in the context of open access publications in scientific journals) and an extended maximum project duration of up to 12 months;
- the administrative procedures and the support structures have been rated quite positive;
- all grantees feel more motivated to pursue their research career within the Western Balkans region after the WBMS experience;
- the exploitation of the project results is rather impressive and included conference proceedings, publications in peer reviewed scientific journals, policy briefs, participation in global technology award competitions, promotion of the results to companies etc;
- the vague definition of RI within the WBMS proved to facilitate the mobilisation of very different types of RI: laboratories, technical equipment or machines like a Fourier-Transform-Infrared spectroscope or benchmark power grids, software licences needed to analyse data, libraries etc.;
- in addition to the access to RI it was of crucial importance that the grantees also benefited from training and hands-on experience at the host institution.

5 Recommendations

As outlined in the chapter on the evaluation of the WBMS, the WBMS turned out to be effective in supporting young researchers in the WB within their career development but also in improving excellence in the WB and in enhancing the intraregional mobility especially with regard to a more efficient usage of the RI in the WB. With these aspects the WBMS provides a unique funding opportunity to young researchers in the WB. The WBMS proved also to be strong in the field of efficiency - both with regard to the slim administrative procedures and the high output regarding the invested low budget of EUR 100,000 for the whole measure.

Therefore, a follow-up of the WBMS is highly recommended. It is encouraged to spread the success story of the WBMS widely in order to successfully find a donor or a funding mechanism - no matter if on global, regional or economy level - for a follow up measure. All crucial regulations can be found in the annex, so it should be easy to build on the experiences and procedures developed within the POLICY ANSWERS project for this mobility measure.

The current WBMS design can be used as is, apart from two lessons learned: The first one addresses the design of the WBMS, with an extended maximum project duration of up 12 months and an increase in the maximum project sum exceeding the current EUR 5,000 being highly recommended. The second one refers to the importance of a comprehensive dissemination and promotion strategy in order to reach the target group. This would include especially the use of social media, but also the need for regional networks and - most important - personal contacts of multipliers in the region.

6 Annex

6.1 Input Paper for the virtual POLICY ANSWERS/internal workshop on WB researchers' mobility on 1 March 2023



Input Paper for the virtual POLICY ANSWERS / internal workshop on WB researchers' mobility

March 1, 2023, 10:00 - 12:00 (tbc)

1. Aim of this workshop and background

Background

POLICY ANSWERS T5.2 has the aim to create, implement and evaluate a pilot mobility programme for the region. The concept and the scope of this mobility programme should be based on one of the four ideas (three on regional mobility, one on intersectoral mobility, please see 2.), the International Service Facility (ISF) authors Dr. Göran Melin, Technopolis Group; Dr. Klaus Schuch, ZSI; Dr. Elke Stewering, DLR-PT have identified and outlined in their 2021 report *Researchers' Mobility in the Western Balkans* (please find attached).

A total of 100.000 euro¹ is available as budget for the grants within the pilot mobility programme. However, no additional budget is earmarked for the implementation of the call. POLICY ANSWERS has two options to spend the budget, either directly giving grants to mobile researchers or hosting organisations with a maximum of 60.000 per grant (grants to third parties) or by concluding a contract with another organisation who would implement the mobility scheme (service agreement).

The launch of the pilot call is planned for April 2024 and the concluding Deliverable D5.5 - the report on the regional mobility scheme - has to be submitted in December 2025 at the latest. In order to have sufficient time for the application, assessment and contracting phase of the projects as well as for the evaluation of the scheme we would expect a time frame of implementation of the mobility scheme of around six months.

The POLICY ANSWERS coordinator, the WP-lead and the task lead would like to make a proposal for a scheme to implement as pilot measure within T5.2 (see chapter 3.). This proposal is based on an elaboration on each of the four ideas for mobility schemes in order to analyse its feasibility, relevance and future possibilities (see chapter 2.) and - in doing so - to identify the proposed scheme as pilot measure within T5.2.

Aim of this workshop

At this point we need the experience and the expertise of the POLICY ANSWERS members who are research performing organisations in the region and represent the "to be mobile" researcher resp. research infrastructures for the validation of our analysis and of the suggested scheme which is regarded the most relevant.

¹ The availability of a different budget line outside the project to cover some costs for the implementation is currently explored. This is still to be discussed and confirmed



Furthermore, we will ask the POLICY ANSWERS members for ideas how partners could support the implementation of the scheme and which external partners could be involved as implementation agency for the programm. We will also ask for participants for a workshop to organised April / May 2023 with local experts and stakeholders in the Western Balkans in order to discuss and develop the details of the pilot programme. Finally we would also like to discuss first idears for appropriate implementation conditions for the programme (duration, target group, requirements, financial conditions, etc.).

2. The input: The four mobility schemes proposed by the International Service Facility in its report from 2021

2.1 MSCA Seal of Excellence Scheme for the Western Balkans

Outline according to the ISF report

MSCA Seal of Excellence Scheme for the Western Balkans	
Key data	
Scheme title	2 nd Chance Seal of Excellence Fellowships
Region	WB6: Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia
Potential good practice	A few EU Member States do already use national funds for supporting MSCA fellowships, which were not directly funded, but received a Seal of Excellence
Organisations involved in implementing scheme	
	<p>a) <u>Outgoing from the WB6</u> National Research Funding Agencies and MSCA host organisations. The target is to engage another 5 to 10 National Research Funding Agencies from the non-widening countries (especially those active in the Berlin Process), which provide national funds for those MSCA applicants from the WB6 who received a Seal of Excellence status by the EC and want to receive mobility-based training in an EU Member State advanced in R&I.</p> <p>b) <u>Incoming to the WB6</u> Establishment of a regional fund that supports those researchers from non-WB6 countries who received a Seal of Excellence status by the EC and want to receive mobility-based training in the WB6.</p>
Funding arrangements	
Total budget	€3.5m for around 50 MSCA Seal of Excellence Fellowships for WB6 researchers per year (outgoing) and other €1.45m for around 20 MSCA Seal of Excellence Fellowships per year for researchers who want to receive mobility-based training in the WB6 (incoming).
Funding type	Fellowship along the MSCA regulation; evaluation is done by EC via MSCA; the Seal of Excellence awarded by MSCA shall apply
Funding organisation	<p>a) outgoing Ministries/National Research Funding Agencies from EU Member States</p> <p>b) incoming A joint regional pot (e.g. supplied by IPA).</p>

* This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo Declaration of Independence



Funding mechanism and incentives	Automatic selection of applicants from the WB6 according to the MSCA's proven peer review system, who received a "Seal of Excellence" for their MSCA projects on the basis of the ranking list but are not being EU-funded
Description of Scheme	
Target groups	<p>a) outgoing Post-doc researchers from the WB6 who were awarded with a "Seal of Excellence", but did not receive direct funding from the EC due to budget constraints.</p> <p>b) incoming Post-doc researchers from the non-WB6 who were awarded with a "Seal of Excellence", but did not receive direct funding from the EC due to budget constraints.</p>
Main institutions involved	<p>MSCA fellows from the WB6 and their presumable host organisations in EU Member States.</p> <p>MSCA fellows from the non-WB6 and their presumable host organisations in WB6 economies.</p>
Duration	This scheme should run at least the first five years of Horizon Europe. The individual fellowships duration corresponds to MSCA practices.
Research areas	Bottom-up
Eligibility requirements to participate	Applicants only who received a "Seal of Excellence" for their non-funded MSCA individual post-doc fellowship project
Potential obstacles in scheme implementation	<p>A return home to the WB6 has to be contractually agreed.</p> <p>An organisation to manage a joint regional pot needs to be appointed (only for incoming to WB6).</p>

Analysis:

a) Feasibility

On the positive side, application and assessment procedure would be already completed by EC, so no call as such has to be designed. It would fit the EC ambition for synergies. It is an attractive scheme for those researchers that missed the mark and then could still get funding.

But overall the feasibility for POLICY ANSWERS is low.

First of all, this scheme seems not to be suitable for the POLICY ANSWERS pilot as adaptation of the initial application according to the conditions of the POLICY ANSWERS pilot mobility programme would have to be carried out, e.g. since the official project duration lasts from a minimum of one up to two years and the POLICY ANSWERS pilot mobility projects are expected to last shorter it would be necessary to condense the initial applications.

The indications in the ISF proposal calculate with approx. 70.000 euro per year per project. This seems to be a reasonable average since e.g. Italian second chance grants vary between 40.000 and 60.000 euro per year, Spanish support with about 90.000 euro per year, Suisse support for six months up to two years shows in addition some temporal flexibility². A high share of the project cost belongs to the cost for living allowance which are heavily related to the host country³. However, the variety in the examples listed could not

² https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/seal-excellence/funding-opportunities-under-msca_en

³ MSCA work mainly with lumpsums.

be explained with the so-called country correction coefficients of MSCA alone. Overall, financially, the scheme would allow us only to support 1 or maximum 2 grants, which is not very attractive as a regional pilot.

Since the calls within the MSCA Postdoctoral Fellowships (PF) European Fellowships (EF) programme are bottom-up, theoretically priority areas already identified within WP4 yet could be taken in account, in case that several applications exist, that are not funded so far.

How could we adapt this MSCA scheme to the conditions of a pilot programme?
What would it look like then?

The adaptation of the initial PF applications to a project lifetime of six months, eventually further reduction of the project costs through lower lump sums for living costs etc. could result in the funding of a maximum of two incoming and two outgoing PF.

b) Relevance

Unfortunately, no statistics about the nationality of the researchers in the MSCA PF EF programme is provided. So, it is impossible to find out how many (outgoing) researchers from the WB received a SoE or funding in the last years. Yet, the outgoing component of the suggestion is also not in line with POLICY ANSWERS plans to pilot a mobility scheme within the region and not towards EU Member States.

However, within the MSCA PF call 2021, only two applications addressing the WB (income) are eligible for the SoE (threshold of 85 out of 100 points), and both involve host institutions in Serbia. Thus, such a MSCA SoE scheme is attractive for Serbia only, but not for other WB economies at this point.

Furthermore, incoming (to WB) MSCA Postdocs applications that received the Seal of Excellence⁴ (MSCA PF EF SoE) could be funded within the programme for the “Widening Fellowships”, since all WB are eligible widening countries. The budget for “Widening (or ERA) -Fellowships” comes from the “Widening Participation and Spreading Excellence” program. There are no extra calls, but MSCA PF evaluates the applications and projects that cannot be funded due to insufficient budget are then funded through the Widening budget.

Concerning the outgoing (from WB) MSCA Postdocs applications currently more than a dozen EU Member States do fund second chance fellowships (based on the SoE) for researcher in host organisations in their countries.

c) Future possibilities

The general objective of the Instrument for Pre-accession Assistance (IPA) instrument is to support the WB as beneficiaries in adopting and implementing the reforms required by them to comply with Union values as well as rules, standards, policies and practices with a view to Union membership. Although for many years it was tried to access IPA funding for research related activities

⁴ These proposals received 85 and more out of 100 possible points within the assessment process.

- since education, research and innovation do have links to the competitiveness of the countries - only few and little success stories are reported. In this light it appears not very likely to be able to use IPA funds for the 2nd Chance Seal of Excellence Fellowships. Opportunities could arise nationally, but unlikely on a regional level.

In case that in the follow-up mobility programme the donors are - as proposed within the ISF report - a group of national agencies or ministries it appears to be quite difficult to match the seal of excellence holder from the WB with their intended host organisation in a random EU Member State with a potential donor.

Within the Berlin Process the Joint Science Conference of the Berlin Process uniting national academies, universities, public research organisations, eminent scientists and science-affine international organisations developed the concept of the “Western Balkans Research Initiative” in 2017. The idea of this initiative was to enable outstanding early-career scientists to build up excellent R&I structures in the WB6 within a period of five to seven years, establishing collaborative networks with peers in research-intensive EU MS. Although the initiative received an excellent response it could not implemented so far due to the lack of funding. Although both schemes address early-career scientists there is little hope that a party involved in the Berlin Process would fund the MSCA SoE scheme.

d) Conclusion

The feasibility of the 2nd Chance Seal of Excellence Fellowships seems to be quite good. In particular for Serbia, this scheme could be considered for implementation. Nevertheless, for the implementation as a pilot scheme within POLICY ANSWERS too many adaptations have to be made and, in the end, too less projects could be funded.

2.2 Research infrastructure-based training and mobility scheme

Outline according to the ISF report

Research infrastructure-based training and mobility scheme	
Key data	
Scheme title	Research Infrastructure Fellowships
Region	WB6: Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia
Potential good practice	➤ Mobility based training schemes already provided by large scale-research infrastructures
Organisations involved in implementing scheme	
	A voluntary alliance of major mid- to large-scale research infrastructure providers. The target is an alliance of at least 10 major mid- to large-scale research infrastructure providers.
Funding arrangements	



Total budget	€2.25m for around 15 competitively awarded WB6 researchers per year
Funding type	Grants with national co-funding (15%)
Funding organisation	Common European funding pot (preferably IPA)
Funding mechanism and incentives	2-stage application procedure. Selection of the best and most feasible experiments suggested by WB6 researchers in consultation with the research infrastructure operators.
Description of Scheme	
Target group	Post-Doc researchers from the WB6 who provide a convincing experiment or research design to be implemented at a mid- to large-scale European research infrastructure.
Main institutions involved	European mid- to large-scale Research Infrastructure Operators
Duration	This scheme should run at least the first 5 years of Horizon Europe. For the preparation, implementation and analysis of the experiments a duration of one year should be foreseen.
Research areas	Bottom-up
Eligibility requirements to participate	Applicants only from the WB6 who undergo a 2-stage selection procedure for their experiments. National co-financing of 15%.
Potential obstacles in scheme implementation	Such an action probably also needs a preliminary familiarization phase so that presumptive applicants from the WB6 can get a realistic picture of the opportunities that prevail at the research infrastructure. For this purpose, further resources should be made available to both, the participating research infrastructures and the potential applicants (e.g. to make a roadshow of the research infrastructure in the WB6).

Analysis:

a) Feasibility

Regional (as well as European) research infrastructures (RI) comprise a huge variety of institutions and labs, even if we focus on major mid- to large-scale research infrastructure providers, as supposed. In addition, the access, the working conditions and costs differ from RI to RI. Against this background, it may make sense to focus within this scheme on a specific group of RI or on one research area in order to reduce complexity, at least within the pilot scheme. ESFRI e.g. offers a list of six scientific domains to group all existing RI: energy, environment, health & food, physical sciences & engineering and social & cultural innovation. The RCC has mapped the regional research infrastructures and roadmaps are available illustrating the diversity. Furthermore, RIs have discussed their open access policies under guidance of the RCC and its experts. POLICY ANSWERS has selected good practices of RIs.

It could be assumed that the 150.000 € per one-year project mentioned in the outline above, cover not only the costs for preparation, implementation and analysis of the experiments at the RI but also the underlying research project as such. As mentioned, the costs for accessing the RI and to run experiments differ a lot between the various RI, among others because of the variable

amount of operative costs like energy etc. However, depending on the selected RI and the resp. research project it might be possible to cut down this amount seriously. Again, the scientific discipline is also of relevance for the amount of budget needed.

In order to focus on the scientific discipline, the most promising, it would be helpful to map the needs of the researcher in the WB first. No matter how experienced the researcher from the WB, it could be assumed that in almost any case additional information not only about the RI landscape in the region, but about its' opportunities for the resp. research approach would be helpful. This need was also identified in the scheme outlined above. In close cooperation with T5.4 it should be possible to pool together information for each discipline or topic.

The way and the amount to which the hosting RI are involved in this scheme could be different. On the one hand, it would be great if POLICY ANSWERS manage to get active support by a group of RIs. This would lead to a good visibility of the measure and could pave the way for a privileged access for the researchers from the WB. On the other hand, the support of the RI could be quite difficult to achieve and the idea off a stand-alone fellowship scheme that is not depending on agreements with some RI sounds also promising and maybe even easier to manage.

Furthermore, in case that the access of WB researchers to RIs would be required in the context of an international research project with partners who have a privileged access to a specific RI, this could facilitate and enhance the access for the WB partner, preferably together with industrial partners.

(In general, it seems that we can divide the experiments at RI in two groups: While one group comprises scientific or applied research projects which requires some kind of measurement or experiment at a RI to achieve its aims, so-called user, the other group focus on the development of new measuring devices for / at the resp. RI.)

A more general consideration: Although the Research Infrastructure Fellowships outlined above focus on a better access to European RI only, the scheme implemented within POLICY ANSWERS should focus on the RI landscape in the WB. Since one of the tasks of T5.4 is to identify regional RI, close cooperation is recommended with the task leader from T5.4 also in this regard.

How could we adapt this Research Infrastructure Fellowships scheme to the conditions of a pilot programme? What would it look like then?

By limiting the pilot to a specific scientific domain and / or a specific subgroup of RI as well as a focus on covering the mobility costs only and not any additional costs for consumables etc., a serious reduction of costs (in relation to the initial calculation of the ISF) could be expected. In addition, we also expect a maximum of six-month duration of the pilot projects, which is half as long as calculated by the ISF, and which will lead to a further reduction of the costs.

b) Relevance

The inclusion of the RI topic in the POLICY ANSWERS project and the aims of T5.4 clearly underline the high relevance of the topic of research infrastructures for the WB. The Research Infrastructure Fellowships would be a good complementation for the activities of T5.4.

c) Future possibilities

As mentioned in chapter 2.1 on the *2nd Chance Seal of Excellence Fellowships* using IPA funds for research-related activities like the *Research Infrastructure Fellowships* may not be impossible but also not with good prospects, since research and innovation are not at the heart of IPA.

Although it seems imaginable that single teaming or twinning projects could include access to RI, currently no opportunities exist to run a follow-up programme on Research Infrastructure Fellowships in the context of the *Widening Participation and Strengthening the ERA* programme. However, the section *Reforming and Enhancing the European R&I System* may offer at least some linkages to this topic and should be examined in more detail.

d) Conclusion

Several options for cutting down the costs (in relation to the initial calculation by ISF) as well as next steps to shape a possible concept could be identified. In addition, and at first sight we could expect a medium to high relevance of this scheme - which has to be validated by the POLICY ANSWERS consortium.

In any case, close cooperation with T5.4 and the POLICY ANSWERS RI ambassadors seems necessary for answering the open questions and for shaping a sound concept of a possible pilot measure.

2.3 Networking and mentoring scheme for WB6

Outline according to the ISF report

Networking and mentoring scheme for WB6	
Key data	
Scheme title	Dual Transition Network Booster
Region	WB6: Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia
Organisations involved in implementing the scheme	
	<p><u>Alternative 1 (with priority)</u>: Implementation via the Twinning Scheme of Horizon Europe through a dedicated call addressed to the WB6.</p> <p><u>Alternative 2 (more complicated)</u>: Organisation through a new ERA-NET including Member States and WB6 countries based on variable geometry. Such ERA-NET should thematically focus on green and digital transformation (the thematic orientation needs to be further detailed).</p>
Funding arrangements	
Total budget	€750,000 for each competitively selected network for a duration of 30 months. €22.5m for a total of 30 research networks.



Funding type	Grants
Funding organisation	Alternative 1: Horizon Europe (through the Twinning Scheme) Alternative 2: Countries/agencies participating in a new ERA-NET
Funding mechanism and incentives	Call for proposals This scheme strengthens cooperation within the WB6 region and with the EU in general.
Description of Scheme	
Target group	Young post-doc researchers from the WB6 research institutions. A research network should consist of a minimum of six to maximum 10 WB6 young post-doc researchers from at least 2 WB6 under the guidance of two top-level research institutions providing experienced senior researchers from two different EU Member States or one EU MS and one country associated to Horizon Europe (except WB6)
Main institutions involved	Research teams located in research organisations in WB6 plus at least two research organisations from two different EU MS or minimum one EU MS and one associated country (other than WB6)
Duration	Each network should run for around 30 months in order to allow enough time to implement the competitively selected joint research projects in the field of the dual transition, to jointly prepare a minimum of 4 European or international research proposals and to provide mentoring and strategic advice.
Research areas	Research in the field of the green and digital transformation
Eligibility requirements to participate	Bottom-up formation of young researcher networks from the WB6 (max. 5 years after their PhD) in specific thematic areas related to the dual transition.

Analysis:

a) Feasibility

The mobility component in this scheme is only weakly developed. Since the focus of these researcher networks lies on the implementation of research projects, mobility is not at the heart of this scheme.

The high budget of 750.000 euro per network, the long project duration of 30 months and the complex structure - a mix of research project, twinning project and research network - makes it very difficult to adjust the *networking and mentoring scheme for WB6* to the conditions of the pilot measure. If we split the scheme in its components, only the research networks could be of interest.

In case the focus of the networks is shifted to proposal preparation, feasible calls that could be addressed in Horizon Europe could be launched in autumn 2024 and deadline in summer 2025. The work programme 2023-2024 for *Cluster 4: Digital, Industry and Space* offers several calls in *Destination 1: Climate neutral, Circular and Digitised Production* that are addressing dual or twin transition in 2024. However, even the latest calls are too early with a launch on 19 Sep 2023 and a deadline of 07 Feb 2024. If the work programme for 2025 (-2026) - which could be expected not prior to late 2024 - sticks to the same structure and topics it may eventually fit to the pilot scheme with the first calls to be launched in late 2024. Since the twin transition is a cross-cutting topic, also in other clusters projects in the field of twin transition could be funded, but the situation with the work programmes stays the same.

How could we adapt the networking and mentoring scheme for WB6 to the conditions of a pilot programme? What would it look like then?

It seems quite difficult to adapt the *networking and mentoring scheme for WB6* to the conditions of the pilot measure, since the costs and the duration of its projects are far away from the opportunities, that could be offered by the pilot measure.

The reduction of the projects in the *networking and mentoring scheme for WB6* to network booster as a kind of a regional scheme for proposal preparation would be an option.

b) Relevance

This scheme seems to be a heavy mixture of a) joint research projects in the field of dual transition with young researchers, b) twinning projects and c) networks / platforms / big consortia which prepare applications for European innovation and research programmes.

As mentioned above, the component of the research networks could be of interest as a stand-alone application within a pilot measure. This should be easy to implement. However, it could be assumed that the need for such a scheme is limited since at least some countries already offer similar schemes. In Germany e.g., for more than ten years the Federal Ministry of Education and Research (BMBF) offers almost continuously the opportunity to support the preparation of applications for European innovation and research programmes, currently in the context of the so-called Bridge2ERA⁵ instrument for up to two years project duration and up to 120.000 euro budget. Since the WB is also target region in this German networking instrument, mobility - costs for travel to and stay in Germany - could be covered for researcher from the WB. Serbia also had - at least for some time - a similar programme, other countries maybe too.

c) Future possibilities

It is quite difficult to identify appropriate funding opportunities for the follow-up scheme. According to the complex structure of this scheme - as described above - it would neither fit in any Twinning call nor to any other (Widening) instrument in Horizon Europe. Even if we would shift the focus to the mentoring aspect, the scheme would not fit into the known calls of the Twinning instrument easily.

With regard to the Twinning Western Balkans Special from June 2021 and although neither in 2023 nor in 2024 similar calls are foreseen, maybe the work programme for 2025 could make hope. In case that the COM could be convinced to top up the widening budget for an additional WB call, there could be opportunities within the resp. programme committee to design this call to the needs of the WB and if requested to the concept of this scheme.

⁵ <https://www.bmbf.de/bmbf/shareddocs/bekanntmachungen/de/2021/10/2021-10-18-Bekanntmachung-Bridge2ERA2021.html>

d) *Conclusion*

The mobility component in this scheme is only weakly developed. In addition, this scheme as it is, seems almost impossible to downsize to the conditions of the pilot scheme, since the projects under this scheme are too big, too expensive and too long. Even as revised version with a focus on the networking aspect, the relevance is limited, since similar programmes already exist.

2.4 Knowledge transfer partnerships (KTP) mobility scheme

Outline according to the ISF report

KTP Mobility Scheme	
Key data	
Scheme title	A KTP Mobility Scheme for the WB6
Region	WB6: Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia
Potential good practice	<ul style="list-style-type: none"> ➤ facilitate the transfer of knowledge and the spread of technical and business skills ➤ provide business-based training for graduates in order to enhance their commercial and specialist skills ➤ stimulate and enhance business relevant research and teaching undertaken by the Knowledge Base (the University) ➤ create employment opportunities for graduates
Organisations involved in implementing scheme	
	<ul style="list-style-type: none"> ➤ Ministries in charge of research, education and innovation ➤ <i>To be decided upon</i>
Funding arrangements	
Total budget	<i>To be decided upon</i>
Funding type	<i>To be decided upon</i>
Funding organisation	<i>To be decided upon</i>
Funding mechanism and incentives	<p>Questions to be addressed:</p> <ul style="list-style-type: none"> ➤ Have any incentives for individual researchers been put in place for the intersectoral mobility scheme? ➤ Have any incentives for specific institutions been put in place for the intersectoral mobility scheme? ➤ What support structures have been put in place to help researchers whilst they are undertaking a mobility period?
Description of Scheme	
Target group	Recent graduates with a capability to lead a research project
Main institutions involved	Universities and research organisations as partners in the project Industrial companies as direct beneficiaries
Duration	Duration of intersectoral mobility period between three and six months, depending on the project requirements
Research areas	<ul style="list-style-type: none"> ➤ Open to all research fields ➤ The research topics covered depend on the agreement between the HEI and the company
Eligibility requirements to participate	Masters' degree in a relevant subject area
Potential obstacles in scheme implementation	<ul style="list-style-type: none"> ➤ Lack of suitable funding ➤ Administrative barriers ➤ Intellectual Property Rights (IPR) issues ➤ Lack of commitment on behalf of the academic and/or the industrial partner

Analysis:

a) Feasibility

The *Knowledge Transfer Partnerships (KTP) Mobility Scheme* outlined above is different from the other three schemes, as it usually supports intersectoral mobility only instead of geographical mobility. Since the idea of T5.2 is to develop and run a regional mobility scheme within the WB, this scheme has to be complemented with a regional component. Against the background that there are already several potential obstacles to overcome in a national KTP (please see list above), it seems even more - and maybe too - challenging to demand from the enterprise to look for a researcher from a neighbouring economy.

Furthermore, this scheme is the vaguest, since many specifications are lacking yet, making this scheme more an idea than a concept. However, the short project duration of three to six months and the expected relative low costs - since usually mainly wages for the researcher will apply - would make it relatively easy to adapt this scheme to a pilot measure.

How could we adapt the networking and mentoring scheme for WB6 to the conditions of a pilot programme? What would it look like then?

A budget around 25.000 euro and a duration of at least three months seem to be feasible specifications for the projects of the pilot measure. In order to meet the conditions of the pilot programme, a regional - means cross border - component would need to be included, although it may reduce the amount of applications significantly.

b) Relevance

Improving the competitiveness and the innovation capacity in the WB is of high importance. This is the reason why in three out of six WB economies innovation funds are up and running, sometimes already for many years. The enhancement of the linkage between economy and research through KTPs addresses an interesting but also very challenging aspect of the innovation chain (see potential obstacles in scheme implementation above).

Several adaptations of the initial British KTP scheme by other countries exist, e.g. the Czech Republic ran such an adaptation from 2015 - 2020⁶.

In T5.1 on regional incentives supporting academia-industry links POLICY ANSWERS currently develops also a grant scheme that focuses on the same link of the innovation chain in the WB as this scheme. In order to use funds efficiently and to avoid overlapping in these two tasks it should be discussed not to consider the KTP Mobility Scheme as a possible scheme for T5.2.

c) Future possibilities

Although a KTP Mobility Scheme would fall in the responsibility of the respective ministries it seems difficult to imagine that these unite to a club

⁶ <https://www.agentura-api.org/en/programy-podpory/partnerstvi-znalostniho-transferu/>

of donors in order to fund the KTP as a regional scheme. Since the differences in size and duration between the projects in the pilot measure and the upscaled scheme appear to be not that big, also limited additional funds for follow-up measures could be sufficient.

d) Conclusions

Since in the original scheme the lack of the geographical mobility is not easy to add without losing attractiveness and - even more significant - since T5.1 is already addressing the same issue with an own grant scheme, the *KTP Mobility Scheme* appears not to be a promising choice as mobility scheme in T5.2.

3. The Output: Selection of the *Research Infrastructure-Based Training and Mobility Scheme* for the pilot regional mobility scheme

Summing up: The MSCA Seal of Excellence Scheme seems not to have a critical mass to make it really relevant for the WB6. Even after adaptation to the framework of a pilot scheme, the projects will still be too expensive to provide more than four grants.

The Networking and Mentoring Scheme could be adapted to a pilot scheme but this would need major reductions of the scope of the programme. Additionally, the mobility aspect of the scheme is quite low, which does not fit into the targets of T5.2 as outlined in the DoA.

Establishing a Knowledge Transfer Partnerships Mobility Scheme would be of relevance for the WB6. It would need more efforts to draft a concrete concept for the scheme, as many specifications has still to be defined - in particular the “cross-border aspects” of the scheme. On the other hand, T5.1 presents a scheme that deals with the promotion of industry-academia partnerships. Another scheme with this focus might cause duplication.

Adapting the research infrastructure-based training and mobility scheme to a pilot scheme will be challenging, but if the focus is narrowed to a specific area or subgroups while shortening the project duration, it will be feasible. The relevance of cooperation in the frame of RIs is underlined in T5.4 and will meet the aims of POLICY ANSWERS. A cooperation between T5.2 and T5.4 will generate synergies.

Considering these aspects and the analysis for each of the four mobility schemes presented above, the research infrastructure-based training and mobility scheme seems to be the most feasible scheme to be carried out within POLICY ANSWERS. Therefore, the authors recommend to focus the future work of T5.2 and therefore concentrate the content of the planned workshop on this scheme.

Attachments

Report of the ISF

4. The next steps: Questions to be addressed further detailing the Regional Research Infrastructure-Based Training and Mobility Scheme

POLICY ANSWERS need to develop answers to several questions. In the next steps, the partners are invited to validate the assessment outlined above and provide further comments and ideas.

Later, a physical workshop with external experts is to be organised.

Examples of the questions are:

- Who would be acting as Secretariat for the scheme and disburse the grants? (currently 100.000 euro at DLR)
- How large should the grants be? (legal maximum is 60.000 euro, probably something between 10.000 and 20.000 euro per grant is realistic, this would mean we can give between 10 and 20 grants, heavily depending on the amounts we have to pay for administration of the scheme)?
- Who should be the target group? (e.g. a joint application between a [young] researcher and a RI or only the RI or only the researcher?)
- Should the target group be narrowed down or should we leave it open? (e.g. focus on young researchers, defined how? Focus on RIs that are featured in the RCC roadmap or RIs pre-selected by T5.4 or any regional RI? Focus on a political priority like “green” or on a scientific field?)
- Should the duration of the mobility be narrowed down or should we leave it open (and only specify a maximum amount)?
- Who should be the recipient of the grant (contract) and the funds? (the mobile researcher or the RI?)
- What type of application should be asked for? (Short application form based on CV? Description of the project? Etc.)
- What type of evaluation should we organise? (if we pre-select the regional RIs and the application comes from the researchers only, then the RIs should handle the evaluation; if we need external evaluators we need a database, selection process for the evaluators, evaluation form, consolidation of their inputs, ranking list, etc.)
- What evaluation criteria should be used?
- Who needs to be involved to discuss these aspects (e.g. in our physical workshop)? (what is the role of the RI ambassadors identified in T5.4? what can we learn from the fellowship scheme Elettra in Trieste is running? Should we involve the RCC? Who are possible organisations that could hand out the grants and how could they be involved?)

Draft Agenda

Virtual POLICY ANSWERS workshop on researchers' mobility Designing a regional mobility scheme for the WB6

March 2, 2023 (tbc)

WEBEX meeting

AGENDA

02/03/2023

	Chair: (tbc)
10:00 - 10:10	Introduction
10:10 - 11:30	Presentation of each of the four mobility schemes including validation and adaptation scenarios (in reverse order of priority)
After each presentation	Discussion
11:30 - 11:40	Conclusion of the discussion
11:40 - 12:00	Next steps

6.2 WBMS Implementation Plan

Western Balkans Mobility Scheme

A POLICY ANSWERS Pilot Programme

Implementation Plan

1. Launch of the call

The call announcement at the Funding & Tenders Portal of the European Commission (EC) and the full call text at the project website was launched on 28 March 2024. A DEC strategy is currently under development with the colleagues from FBLU. A pre-announcement of the call - about one month in advance - has been made. The initial call deadline of 31 May 2024 was prolonged until 26 June 2024.

In order to promote research infrastructures (RI) in the region and to facilitate the contacts between early-career researchers (ECR) and host institutions further information on concrete RI in the six economies will be made available at the POLICY ANSWERS website with the launch of the call. These data will be based on reports of economy-level RI roadmaps and will offer the opportunity to scan the listed RI and equipment for requested types of RI like spectrometer or X-Ray machine in order to make it easier for the ECR to identify an appropriate host institution offering the requested RI.

Since the projects within this scheme are supported by the European Commission according to the Financial Support to Third Parties (FSTP) regulations, the call will be carried out in the light of the same basic principles which govern European Commission calls¹:

- (1) Excellence: The proposal(s) selected for funding must demonstrate a high quality in the context of the topics and criteria set out in the call.
- (2) Transparency: Funding decisions must be based on clearly described rules and procedures, and all applicants should receive adequate feedback on the outcome of the evaluation of their proposals.
- (3) Fairness and impartiality: All proposals submitted to a call are treated equally. They are evaluated impartially on their merits, irrespective of their origin or the identity of the applicants.

¹ “Guidance note on financial support to third parties under H2020” (https://www.ffg.at/sites/default/files/downloads/page/h2020guidancenote_financialsupport2thirdparties.pdf)

- (4) Confidentiality: All proposals and related data, knowledge and documents are treated in confidence.
- (5) Efficiency and speed: Evaluation of proposals and award of the financial support should be as rapid as possible, commensurate with maintaining the quality of the evaluation, and respecting the legal framework.

2. Application

2.1 Application Process

The call-secretariat will be established at DLR Projektträger (DLR-PT). DLR-PT will run a call helpline for providing further advice to the applicants during the electronic submission period of proposals. A guide for applicants will be prepared, too.

The application process will be implemented as one-stage procedure and should be as simple as possible in order to keep the administrative burden of the applicant as low as possible. The application has to be submitted by the early-career researcher (ECR) and in electronic form only. Applications must be in English and signed (1) by the ECR and (2) the counsellor of the hosting institution. A scan of the pages with the signatures will be sufficient. These signatures also form the contractual commitment for those applicants not funded to participate in the evaluation process. The hosting institution is obliged to provide a mentor or peer as so-called “counsellor” as central contact person for the ECR and the call secretariat.

2.2 Call management system (CMS)

As online application tool PT-Outline will be adapted and managed by DLR-PT.

For about 30 years the German Project Management Agencies have been using the professional electronic administration system “profi” for all relevant aspects of research funding within the national German S&T programmes. In addition, a few years ago the web-based tool “PT-Outline” was developed for online submission and handling of project proposals. This tool has been further advanced and tested during the implementation of joint calls of European ERA.NETs from the Sixth Framework Programme on. Since PT-Outline has been updated and fostered in recent years, nowadays its usage is widespread for international joint calls, no matter if bi- or multi-lateral.

General specifications of PT-Outline are (1) data input and data handling via web forms, (2) input data are stored and are fully editable by applicant until finalisation of proposal, (3) error minimisation by mandatory fields and check routines, (4) automated confirmation about successful submission of application via email, (5) password-protected access to proposal according to “one application - one login” principle, (6) export functions via Microsoft Access and / or Excel interface for statistical purpose and further processing of data for assessment and contracting phase, (7) export of application as pdf for print out and signing, (8) compliance with the General Data Protection Regulation GDPR.

2.3 Application form

The WBMS application form at PT-Outline will be accessible at <https://ptoutline.eu/app/wbms>.

In order to lessen the efforts for applicants and peer reviewers and to reflect the limited funding sum of the projects, all data will be inserted by the applicant in an online form, so a database of all application data is generated and could be used for statistical analyses and further processing. No additional project description has to be uploaded. The inserted data covering the project description are limited to around 12.000 characters (including blanks, this would result in about four usual pages).

Main elements of applications are information on (a) the Basics, (b) Home Institution and Early-Career Researcher, (c) Host Institution and Counsellor, (d) Project Description and (e) Requested Funds. In addition, CVs of the recipient and the counsellor (in EUROPASS format) have to be uploaded.

Drafts of the application form (Att_1) and the GDPR (Att_2) document are attached to this document.

2.4 Guide for applicants

A guide for applicants will be prepared, which should list the overall principles of the pilot mobility scheme (quality, transparency, equality of treatment, impartiality etc.) and answer questions, that applicants might have (FAQ) like (1) How do I apply? (2) Do I have to submit a hard copy of my application? (3) What does it mean that the maximum requested budget must not exceed EUR 5,000? (4) Is it allowed to submit more than one application? (5) Is it allowed to visit more than one research infrastructure? (6) Is it allowed to visit research infrastructures in more than one other country? (7) How many applications will be funded? (8) Am I eligible? Etc. Furthermore, the guide should provide screenshots and further information on the CMS and the technical aspects of the application process.

The guide for applicants should also give additional information on eligible costs and how to calculate the requested breakdown of costs in the application form.

Eligible costs are supported by:

(1) an allowance unit cost of EUR 75 per day of the stay - resulting in EUR 2,250 per month (30 days) - to compensate for all travel costs and living allowances of the recipient (including cost for visa etc.). These costs are calculated based on the duration of the stay (if necessary, including also one travel day before the activity and one travel day following the activity). With the final report the applicants must also provide a confirmation of the hosting institution about the number of days the applicant stayed at the hosting institution;

(2) any cost that occurs at the host institution in the context of the access to the research infrastructure. This could be consumables and supplies for the experiments, accessing fees, costs for training at a specific device etc;

(3) costs for exploitation of project results (visibility, publication of scientific article, etc.);

Costs of category (2) and (3) are accounted for as direct costs only (with VAT) that have to be actual, economic and necessary, which means that these costs must be essential for achieving the aims of the project.

Health, accident and personal liability insurances for the time of mobility have to be taken out by the recipient at their own expense. Of course, the allowance unit cost could be also used to fund these expenses.

The maximum project duration is between two weeks and six months. All expenses must occur within the project duration. Only exceptions are any consumables etc. that are needed for the research activities at the host institution during the stay, in case that it is unavoidable to buy them in advance. The financial support may not be used to cover costs that are already covered by other sources.

Information about the contracting process and financial support contract form will also be part of the guide for applicants in order to ensure transparency and speed up the contracting process.

2.5 Online webinars for applicants

It is foreseen to offer two short online webinars in which information is provided about the mobility scheme and its application process. During the meeting, the participants should have enough time to ask questions to the organisers. In addition, DLR-PT will invite participants to send questions in advance, so that they could be sure that their question will be answered.

2.6 Call secretariat

The call secretariat will be located at DLR Projektträger (DLR-PT), Heinrich-Konen-Strasse 1, 53227 Bonn, Germany, email: calls-europe@dlr.de, phone number: +49 228 3821 1482 or 1358.

3. Assessment

3.1 Eligibility check

DLR-PT as call secretariat will complete the eligibility check within one week after the deadline, if possible. Colleagues from the PA consortium representing all six economies

agreed to support DLR-PT within checking the eligibility of the home and host institution according to the respective registries on economy-level:

AL: Imirjon Peza (Imirjon.Peza@nasri.gov.al),

BA: Maja Arslanagic (maja.arslanagic@efsa.unsa.ba),

XK*: Alma Bajrama (Alma.Bajramaj@riinvestinstitute.org),

MK: Gabriela K. Bogoeska (gabriela@mir.org.mk),

ME: Milica Bozovic (milica.bozovic@ntpark.me),

RS: Sanja Popovic-Pantic (sanjap.pantic@pupin.rs).

If in any application the eligibility is under question the coordinator of PA, the WP5 leader and the T5.2 leader should decide together and unanimously.

In order to be eligible, the project outlined in the application must cover the following aspects:

- (1) Short-term mobility within the WB, meaning (a) regional mobility that crosses the border to another WB economy as well as (b) physical mobility between two weeks and two months.
- (2) The use of specialised equipment or facilities (research infrastructures) in another WB, with the definition of research infrastructure according to the European Commission² as a set of facilities, resources and services that are used by the research communities to conduct research and foster innovation in their respective fields. They include: major scientific equipment (or sets of instruments), knowledge-based resources such as collections, archives and scientific data, e-infrastructures, such as data and computing systems and communication networks and any other tools that are essential to achieve excellence in research and innovation.
- (3) All public or private research performing organisations (RPOs) or higher education institutions (HEI) in the WB that are registered in its economy under the respective law and provide research infrastructures (as defined above) are eligible as host institution for the recipient; including virtual research infrastructures, if an added value of the mobility is evident.
- (4) Do research, which is defined as the creation of new knowledge and/or the use of existing knowledge in a new and creative way so as to generate new concepts, methodologies and understandings³.

In order to be eligible, the applicant must comply with the following criteria:

² According to Article 2 (6) of the Regulation (EU) No 1291/2013 of 11 December 2013-“Establishing Horizon 2020 - the Framework Programme for Research and Innovation 2014-2020”

³ Definition of research by the Western Sydney University, https://www.westernsydney.edu.au/research/researchers/preparing_a_grant_application/dest_definition_of_research

- (1) The recipient must be a natural person that has full legal capacity and capacity to contract.
- (2) The recipient must be an early-career researcher, which means that he must be either an enrolled PhD student or a Post-doc, whose doctorate was awarded no longer than seven years before the deadline of this call.
- (3) The recipient must be affiliated to a home institute in the WB.
- (4) The home institute must be either a research performing organisation (RPO) or a higher education institution (HEI), no matter if public or private. The home institute has to be registered and accredited according to the respective law in the WB.

Additional eligibility criteria specified in the call text like the maximum funding sum of EUR 5,000, the maximum and minimum duration of the project and the mobility, the completeness of the application, English language competence of the applicant etc. will be checked either automatically by the CMS during the application process or by the call secretariat.

In case that one or more eligibility criteria are not met, the application should be discarded.

All team members of the POLICY ANSWERS (PA) project are not eligible to apply.

3.2 Assessment Process

The deadline for submitting applications will be 26 June 2024, 17:00 CEST. The assessment of the applications is expected to last until 18 August. The POLICY ANSWERS Steering Group will decide at a meeting foreseen for mid/end of September about the applications to be funded - and which to put on the reserve list. A guide for reviewer will be prepared separately and in due time.

The applications will undergo external remote assessment. A pool of reviewers will be established. DLR-PT will assign two reviewers to each application, external to the POLICY ANSWERS project and external to the region. In assigning the reviewers to the applications, only the best thematic fit of the evaluators should be relevant. The reviewers have to refrain from any discrimination based on gender, nationality etc. It is intended to provide a balanced mix of reviewers according to nationality, sex and age. In addition to the application, the assessment form, a guide for reviewer, the call text and optionally further background documents will be provided to the reviewers in digital form. The reviewers will score the applications against the assessment criteria.

Assessment criteria will be based on the three weighted criteria excellence (40%), impact (40%) and quality and efficiency of the implementation (20%):

(1) Excellence (threshold 3/5):

- *Clarity and pertinence of the project's research and innovation approach and objectives as well as the soundness of the proposed methodology;*
- *Quality of the home and host institution and its research infrastructure;*

- *Extent and quality of the accompanying activities at the host institution like training, capacity building, soft skill development;*

(2) Impact (threshold 3/5):

- *Quality of expected research outputs and relevance to regional, economy-level or local policy context;*
- *Quality of the measures to enhance the career perspectives and employability of the ECR and contribution to his/her skills development;*
- *Suitability and quality of the measures to maximise the exploitation of the research results and its visibility;*
- *Contribution to the establishment of joint follow-up measures and long-term co-operations;*

(3) Quality and efficiency of the implementation (threshold 3/5):

- *Quality and effectiveness of the work plan, hosting arrangements and allocation of resources;*
- *Complementarity of the role and the benefits of all three stakeholders (ECR, home and host institution).*

Furthermore, the reviewer should give comments on a) the appropriateness of requested budget (with concrete recommendation for contract negotiations / reductions of funds - if applicable); b) main strengths & major weaknesses; c) attached conditions to the approval (if any).

The scores should be justified by detailed comments which should be suitable for feedback to the applicants. In case the assessments of an applications show high discrepancies in the total score (variation of more than five points), a third review should be requested and the review which differs the most (in the total score) should be discarded.

Those applications above the thresholds are ranked according to their score (as the mean of the final two assessment), and are placed either on the shortlist (as a funding recommendation) or on the reserve list. These lists will be provided to the POLICY ANSWERS Steering Group. The lists should also contain information on gender of the applicant, whether the recipient has only little or no experience in international cooperation (please see 2.3) and the recipient is located in a capital or not.

According to the little efforts for reviewers - not more than 20 minutes per application-are expected due to the short applications - reviewers will get a symbolic remuneration (EUR 25 per assessment) and a certificate by POLICY ANSWERS. Payments will be made after the closure of the assessment period, based on a payment request signed by the reviewer and sent to DLR-PT by email.

An assessment form will be prepared separately and in due time.

A guide for reviewers will be prepared which should inform about general principles of the assessment process and also give advice in concrete terms for the implementation of the assessment.

Within 30 days of the end of evaluation DLR-PT will inform all applicants individually and in writing about the assessment result and whether their application is selected for funding or not. In addition, DLR-PT will publish a public summary report of the evaluation results on the POLICY ANSWERS website, i.e. the Western Balkans Info Hub. This report will comprise an account of the call, its evaluation and its results, including dates of call, how it was published, dates of evaluation, number of proposals received, number of proposals funded, as well as a list of all selected applications and the requested budget.

3.3 Reviewers

Prospective independent reviewers must have appropriate English language skills. Experts must hold the nationality of a European Union member state or a country that is associated to the Horizon Europe programme. To avoid conflicts of interest, holders of a Western Balkan nationality cannot act as experts. In addition, all reviewers must have at least more than five years of active postgraduate research experience.

The reviewers have to commit themselves by signing a “Code of conduct for reviewers of the POLICY ANSWERS Pilot Scheme: Western Balkans Mobility Scheme” towards DLR-PT, stating that they will conform with the principles outlined therein, amongst others:

- (1) All proposals shall be treated equally;
 - (2) Reviewers will only receive proposals that have been checked by the DLR-PT for their compliance with formal eligibility criteria;
 - (3) All proposals received by the reviewers shall be evaluated completely and reviewers shall carry out a compliance check for content, for ethical principles, and that the research is not of military character. In all cases of non-compliance, the reasons are to be indicated;
 - (4) Each proposal shall be assessed only on the basis of the evaluation criteria published in the guide for reviewer;
 - (5) The assessment of an application shall be based solely upon the information contained in the application;
 - (6) All those involved in the assessment of applications must be impartial and shall abstain from assessing/commenting upon applications for which there is a conflict of interest;
 - (7) Reviewers shall evaluate proposals belonging to their broader domain of expertise;
 - (8) Reviewers must be able to work in the English language
 - (9) Reviewers are obliged to make known any case of conflict of interest (even potential) upon receiving the proposals and prior to evaluation
 - (10) Reviewers must return applications that do not match their field of expertise
- Etc.

3.4 Steering Group & selection process

The Steering Group is the panel which is responsible for the funding decision, it will decide about applications to be funded and those to put on the reserve list. The Steering Group has to decide unanimously and will meet virtually. This group will consist of a total of nine participants, with one representative or nominee from the respective ministry responsible for research in each of the six WB economies, and three representatives of regional organisations like the Regional Cooperation Council (RCC) etc.

Decisions must be based on the ranking list drawn up by the reviewers. Adjustments of the ranking list are only allowed if a) applications are located at the same rank or very close together and b) based on geographical balance of the applicants (between the economies and within the economies) and / or based on inclusivity⁴. While the geographical balance between the economies should ensure an evenly regional distribution of the selected applicants and a regional success of the scheme, the balance within the economies should ensure that not only recipients in the capitals are supported, but also those in lesser developed areas of the respective economy. The aspect of inclusivity should ensure gender balance (at least 30 per cent of the ECR selected for funding are women and/or men, respectively) and benefits for ECR with little or no experience in international mobility.

The aim is to select a minimum of two projects per economy (focusing on the ECR), under the condition of a sufficient number and quality of applications.

At least ten to 15 applications should be placed on the reserve list, since the contracting process could be challenging and it is important to ensure a sufficient amount of applications that could be funded.

4. Contracting

After the meeting of the Steering Group, the applicants will be informed about the outcome of the selection process. The selected applicants, the upcoming recipients, will then be contracted by the DLR-PT in September and October 2024. As call secretariat, DLR-PT will manage the funds. The financial support will be given on the basis of a bilateral contract between the DLR-PT and the recipient, which is the ECR. Letters of Confirmation of the respective home and the host institutions - signed and stamped by the respective legal representative of these institutions - will be integral part of the agreement. The involvement of the home institution is necessary, since it has to confirm that the recipient is affiliated to them and that they are aware of the project and have no objections. Additionally, the home institution should confirm that the recipient will be able to return to his/her workplace after the project, and to apply the new knowledge for the benefit of both him-/herself and the home institution. The involvement of the host institution is necessary, since it has to confirm that the research infrastructure can actually be used in the timeframe specified and that

⁴ Inclusiveness: The quality or practice of including different types of individuals, particularly those who otherwise might be excluded or marginalised. To provide them with equal opportunities, resources, and fair treatment.

further support is granted - like the provision of a workplace for the recipient during his/her stay.

Written form of the contract is mandatory. The financial support contract will come into effect with its signature. In order to accelerate the process, the recipient may supply the DLR-PT with a digital copy of the signed agreement. However, the recipient is obliged to submit the original document within 14 days after supplying the copy and prior to the first instalment.

Projects are expected to start by 1 November 2024 at the earliest and have to be completed until 31 May 2025.

The financial support will be provided in two instalments, a first share as pre-financing (75%) within 30 days after signing the contract, second share after approval of the final report (25%).

The financial support for the recipients is given according to the Horizon Europe regulations for FSTP. This means that the following regulations in the POLICY ANSWERS grant agreement also apply to the recipients, who has:

- (1) to prevent that the implementation of the project is compromised for reasons involving family, emotional life, political or ethnic affinity etc. ('conflict of interests', article 12 GA),
- (2) to keep confidential any data, documents or other material that is identified as sensitive in writing ('sensitive information') ('confidentiality and security', article 13 GA),
- (3) to carry out the action in line with the highest ethical standards and to commit to and ensure the respect of basic EU values (such as respect for human dignity, freedom, democracy etc.) ('ethics and values', article 14 GA),
- (4) to acknowledge the EU support and display the European flag (emblem) and funding statement in all communication activities related to the action like media relations, conferences, seminars etc ('communication, dissemination and visibility', article 17.2 GA),
- (5) to provide any information requested in order to verify eligibility of the costs or contributions declared, proper implementation of the action etc. ('general information obligations', article 19 GA),
- (6) to keep records and other supporting documents to prove the proper implementation of the action ('record-keeping', article 20 GA),
- (7) to accept that the granting authority - the European Commission - and other European bodies as the European Anti-Fraud Office (OLAF) etc. may also carry out checks, project reviews, audits and investigations – during the action or afterwards ('checks, reviews, audits and investigations – extension of findings', article 25 GA).

The contract form also needs reference for partners to care about any arising IPR issues. A template of the contract form including its annex is attached (Att_3). The main parts of the contract form will also be part of the guide for applicants in order to ensure transparency and speed up the contracting process.

5. Reporting

The recipient must provide one (short) report (financial + technical) about the outcome of the project and the use of the financial support within the project within a maximum of 30 days after the end of the project. The financial report should contain a list of the receipts and scans of the original receipts. The original receipts have to be kept by the recipient for a minimum of five years (due to the inspection period of the EC). In case that only unit costs have been accounted for, only a technical report is necessary. This report shall also include a standardised confirmation letter by the counsellor of the host institution, indicating that the recipient has visited the research infrastructure etc. A draft of the reporting form including LoC is attached as Att_4.

The DLR-PT audits if the financial support has been used in accordance with rules and regulations of the financial support contract.

6. Evaluation

Within the evaluation process, it should be analysed, if and to what degree the three objectives of the scheme⁵ have been met. In addition, the strengths, weaknesses, opportunities and threats of this mobility scheme will be assessed, in order to build the ground for a follow-up of the mobility scheme to be funded by economy-level, regional or international stakeholders.

The evaluation will be based on three pillars: (1) The information the applicants will provide within the application form and the call statistics; (2) a first short survey with successful and non-successful applicants and (3) a second short survey (with interview) with recipients and counsellors.

Participation to this evaluation is part of the contractual obligations.

Further details on the evaluation will be described in a separate document.

7. Time table

Call opened: 28 March 2024.

Call to close: 26 June 2024, 17:00 CEST.

Projects expected to start: 1 November 2024 or later (but all projects must be terminated by 31 May 2025).

All final reports collected: 30 June 2025.

Evaluation done and reports prepared: December 2025.

⁵(1) Fostering brain circulation and encourage brain retain within the WB at an early stage of the researchers' careers; (2) Supporting excellence in research in the WB; (3) Promoting and increasing the Open Access use of research infrastructure (RI) across the WB.



Attachments:

1. DRAFT WBMS structure of the application form
2. DRAFT WBMS GDPR note
3. DRAFT of financial contract form incl. LoC for home and host institution
4. DRAFT WBMS reporting form incl. LoC



6.3 WBMS Guide for applicants

Western Balkans Mobility Scheme

A POLICY ANSWERS Pilot Programme

Guide for applicants

!!Please note that the deadline of this scheme is prolonged until 26 June 2024, 17:00 CEST!!

Preface:

This guide contains two chapters, the first, chapter 1, dealing with more general information on the application process as Questions and Answers and the second, chapter 2, providing you with a detailed guideline on how to apply at <https://ptoutline.eu/app/wbms>. In the annex you find the current draft of the financial support contract, which we provided for transparency reasons already in this guide. Please note, that this is only a draft and subject to changes.

Please consult the POLICY ANSWERS website with all call-related documents at <https://www.westernbalkans-infohub.eu/calls/western-balkans-mobility-scheme/> before you start the application process.

If your questions are neither answered at the POLICY ANSWERS website nor within this guide for applicants, please contact the Joint Call Secretariat at DLR-PT (e-mail: calls-europe@dlr.de).

Since the projects within this scheme are supported by the European Commission according to the Financial Support to Third Parties (FSTP) regulations, the call will be carried out in the light of the same basic principles which govern European Commission calls¹:

- (1) Excellence: The proposal(s) selected for funding must demonstrate a high quality in the context of the topics and criteria set out in the call.

¹ “Guidance note on financial support to third parties under H2020” (https://www.ffg.at/sites/default/files/downloads/page/h2020guidancenote_financialsupport2thirdparties.pdf)

- (2) **Transparency:** Funding decisions must be based on clearly described rules and procedures, and all applicants should receive adequate feedback on the outcome of the evaluation of their proposals.
- (3) **Fairness and impartiality:** All proposals submitted to a call are treated equally. They are evaluated impartially on their merits, irrespective of their origin or the identity of the applicants.
- (4) **Confidentiality:** All proposals and related data, knowledge and documents are treated in confidence.
- (5) **Efficiency and speed:** Evaluation of proposals and award of the financial support should be as rapid as possible, commensurate with maintaining the quality of the evaluation, and respecting the legal framework.

1. General information for applicants

1.1. What is the main objective of the POLICY ANSWERS project?

Funded within Horizon Europe, the project entitled POLICY ANSWERS - R&I POLICY making, implementation AND Support in the WEsteRn BalkanS (<https://www.westernbalkans-fohub.eu/about/>) was launched on 1 March 2022. Positioned well in line with the EU's Western Balkans (WB) Agenda on Innovation, Research, Education, Culture, Youth and Sport (WB Innovation Agenda), POLICY ANSWER monitors and supports policy coordination within the EU-WB cooperation, but also provides capacity building and pilot actions in the WB to contribute to the region's EU integration process and to strengthen their innovation ecosystems.

1.2. What is the Western Balkans Mobility Scheme (WBMS)?

This pilot regional mobility scheme launched by POLICY ANSWERS has a call budget of EUR 100,000. It should build the foundation for a follow-up measure to be funded by regional, economy-level or international stakeholders. The aim of this scheme is to enhance regional cooperation and sustained support in mobility-driven R&I and - by fostering the interconnectedness of the WB - to support sustainable economic growth, a common regional market, societal resilience and convergence of the WB with the EU. Enhanced cooperation and sustained support in mobility-driven R&I are also pivotal for equipping the WB with the requisite tools and knowledge to address shared challenges, such as climate change and digital transformation, while fostering a generation of innovators who can reshape the region's future.

1.3. Who is eligible to participate in the WBMS?

Only early-career researchers (ECR) affiliated to a research institution from one of the six Western Balkan economies are eligible within the WBMS. These economies are Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia.

* This designation is without prejudice to positions on status, and is in line with UNSC 1244 and the ICJ Opinion on the Kosovo Declaration of Independence.

1.4. What research topics are eligible for funding within the WBMS?

In order to boost the regional cooperation all thematic research areas are eligible (including Social Sciences and Humanities (SSH) and arts-based research). Applications that address the twin transition (green and digital) of the WB and priorities mentioned in research strategies of economies resp. S3 strategies are particularly welcome. The project must have a civilian purpose.

1.5. Are the WBMS applications similar to Horizon Europe applications?

No, in no way. The application process is much simpler and will be implemented as one-stage procedure. In order to lessen the efforts for applicants and to reflect the limited funding sum of about EUR 5,000 per project, all data will be inserted by the applicant in an online form. No additional project description has to be uploaded. The inserted data covering the project description are limited to around 12.000 characters (including blanks, this would result in about four usual pages).

1.6. How do I submit a proposal?

Please visit <https://ptoutline.eu/app/wbms> and sign up to the WBMS call management system. During your registration, you will be asked for your e-mail address, which will be used as your login. Your password will be sent to the e-mail address you provided. The password is case-sensitive and cannot be changed by you. When you return to the login page, you can log in and start using the application. All forms are interactive. Please save each page before proceeding to the next. Please use only English characters since non-English characters, such as č, ć, š, đ and ž may not be displayed correctly in the final application.

1.7. What are the eligibility criteria?

The eligibility criteria for the applicant, the application as such and the requested costs are provided in the WBMS call text which you can access at <https://www.westernbalkans-infohub.eu/calls/western-balkans-mobility-scheme/>.

1.8. Which costs are eligible?

Eligible costs are supported by:

- (1) an "allowance unit cost" of EUR 75 per day of the stay - resulting in EUR 2,250 per month (30 days) - to compensate for all travel costs and living allowances of the recipient (including cost for visa etc.);
- (2) any cost that occurs at the host institution like accession fees, consumables etc.;
- (3) costs for exploitation of project results (visibility, publication of scientific article, etc.);

Costs of category (2) and (3) are accounted for as direct costs only (with VAT) that have to be actual, economic and necessary.

Health, accident and personal liability insurances for the time of mobility have to be taken out by the recipients at their own expense.

The financial support may not be used to cover costs that are already covered by other sources. The financial support is not renewable.

1.9. I'm working at an institution which is part of the POLICY ANSWERS consortium. Am I eligible?

This depends: All team members of the POLICY ANSWERS project are not eligible to apply. So, if you work e.g. at the Mihajlo Pupin Institute you are eligible as long as you are not involved in the project.

1.10. What is the deadline for the submission of applications?

The deadline for submission of applications is ~~31 May 2024, 17:00 CEST~~ **prolonged until 26 June 2024, 17:00 CEST.**

1.11. In addition to the online submission procedure, should I submit a paper copy of the application?

No. Only electronic submissions will be considered. However, please note that after submission of your application in PT-Outline, please remember that there is still one task to do in order to apply successfully for a WBMS project: The cover pages of the application must be printed, signed by the early-career researcher as well as by the counsellor, scanned and send as pdf-file to calls-europe@dlr.de.

1.12. Do I need the legal representatives of the home or host institution to sign the WBMS application?

No, we tried to make the application procedures as simple and hassle-free as possible. So, it is only the early-career researcher as applicant and the counsellor to sign the first page of the application form. But please note, that for the contract negotiations we will need the signature of the legal representatives from the home and the host institution on Letters of Confirmation which will be part of the financial support contract.

1.13. Can I submit more than one application?

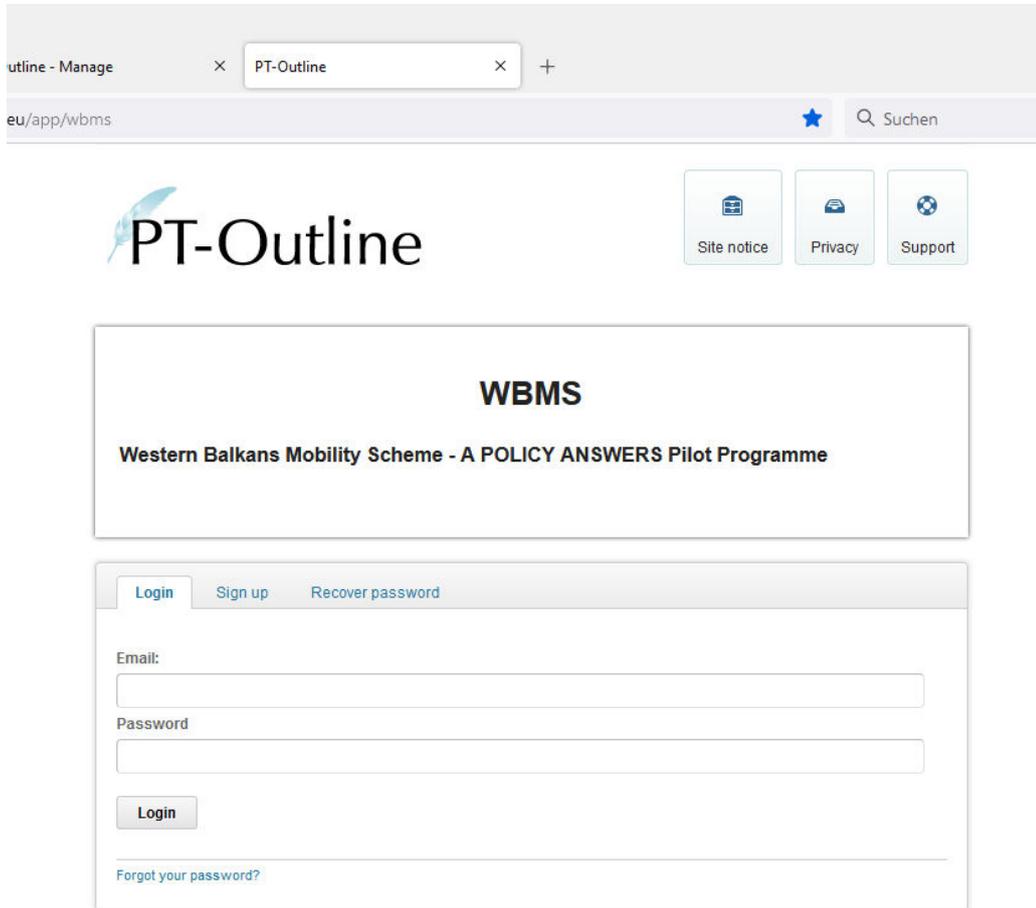
No, each applicant is only allowed to submit one application. This limitation is made in order to ensure that all applications submitted could be implemented as applied. It could not be expected that the early career researcher is able to implement more than one project in the provided very short implementation period.

1.14. What does it mean that the maximum requested budget must not exceed EUR 5,000?

EUR 5,000 is the maximum amount of funding per project that can be provided from the WBMS budget. However, there is no limit on the total costs for the project's implementation, meaning that contributions from other sources can be used to make up the total project budget.

- 1.15. What are the review criteria for the WBMS applications?**
The review criteria are outlined in the in the WBMS call text which you can access at <https://www.westernbalkans-infohub.eu/calls/western-balkans-mobility-scheme/>.
- 1.16. Is it allowed to visit more than one research infrastructure?**
No, this would complicate the administrative procedures and the overall structure of the WBMS project.
- 1.17. Is it allowed to visit the same research infrastructure several times in the course of the project?**
Yes, if this is necessary to reach the aims of the WBMS project then this is allowed.
- 1.18. Is it allowed to visit research infrastructures in more than one other economy?**
No, this would complicate the administrative procedures and the overall structure of the WBMS project.
- 1.19. Is it relevant for this scheme in which economy I was born?**
No, it is relevant in which economy the home institution is located to which you are affiliated to.
- 1.20. Is it allowed to have more than one grantee in a project?**
No, each project has to be implemented by one early-career researcher only.
- 1.21. How many applications will be funded?**
Since the call budget is around EUR 100,000 and the maximum funding sum EUR 5,000 we expect to fund around 20 WBMS projects.
- 1.22. What are the main regulations laid down in the financial support contract?**
In the annex you find the current draft of the financial support contract, which we provided for transparency reasons already in this guide. Please note, that this is only a draft and subject to changes.
- 1.23. Do I have to upload any attachments to the application?**
Yes, it is mandatory to upload the CVs of the early-career researcher and the counsellor (the counterpart at the host institution) in EUROPASS format before submitting the application.

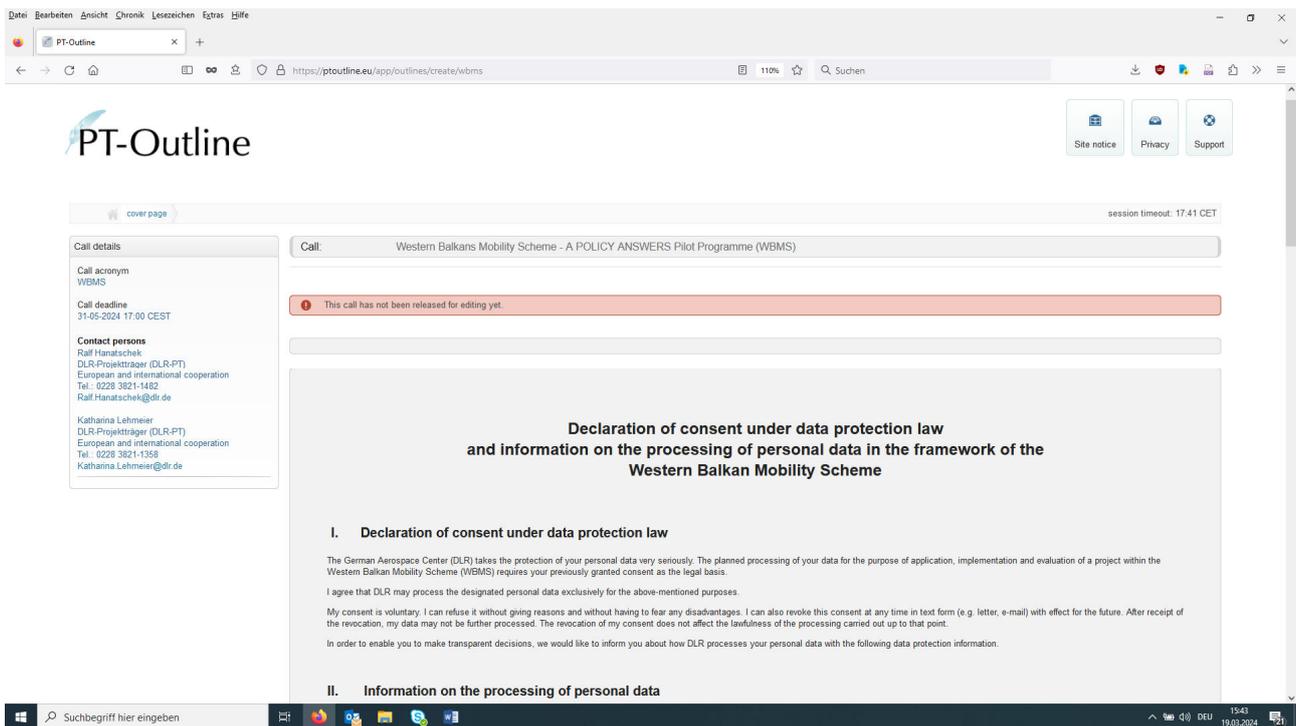
2. The online application procedure for submitting a WBMS application



The screenshot shows a web browser window with the following elements:

- Browser tabs: "Outline - Manage" and "PT-Outline".
- Address bar: "eu/app/wbms" with a search icon and the text "Suchen".
- PT-Outline logo with a blue feather icon.
- Navigation links: "Site notice", "Privacy", and "Support".
- WBMS header: "WBMS" and "Western Balkans Mobility Scheme - A POLICY ANSWERS Pilot Programme".
- Login options: "Login", "Sign up", and "Recover password".
- Form fields: "Email:" and "Password:" with corresponding input boxes.
- Login button: "Login".
- Link: "Forgot your password?".

During your registration via the sign-in dialogue, you will be asked for your e-mail address, which will be used as your login. Your password will be sent to the e-mail address you provided. The password is case-sensitive and cannot be changed by you. When you return to the login page, you can log in and start using the application. All forms are interactive. Please save each page before proceeding to the next. Please use only English characters since non-English characters, such as as č, ć, š, đ and ž may not be displayed correctly in the final application.



The screenshot shows the PT-Outline web application interface. The browser address bar displays <https://ptoutline.eu/app/outlines/create/wbms>. The page title is "PT-Outline". On the left, there is a sidebar with "Call details" for "Western Balkans Mobility Scheme - A POLICY ANSWERS Pilot Programme (WBMS)". The main content area shows a call title and a red warning message: "This call has not been released for editing yet." Below this is a large grey box containing the following text:

Declaration of consent under data protection law and information on the processing of personal data in the framework of the Western Balkan Mobility Scheme

I. Declaration of consent under data protection law

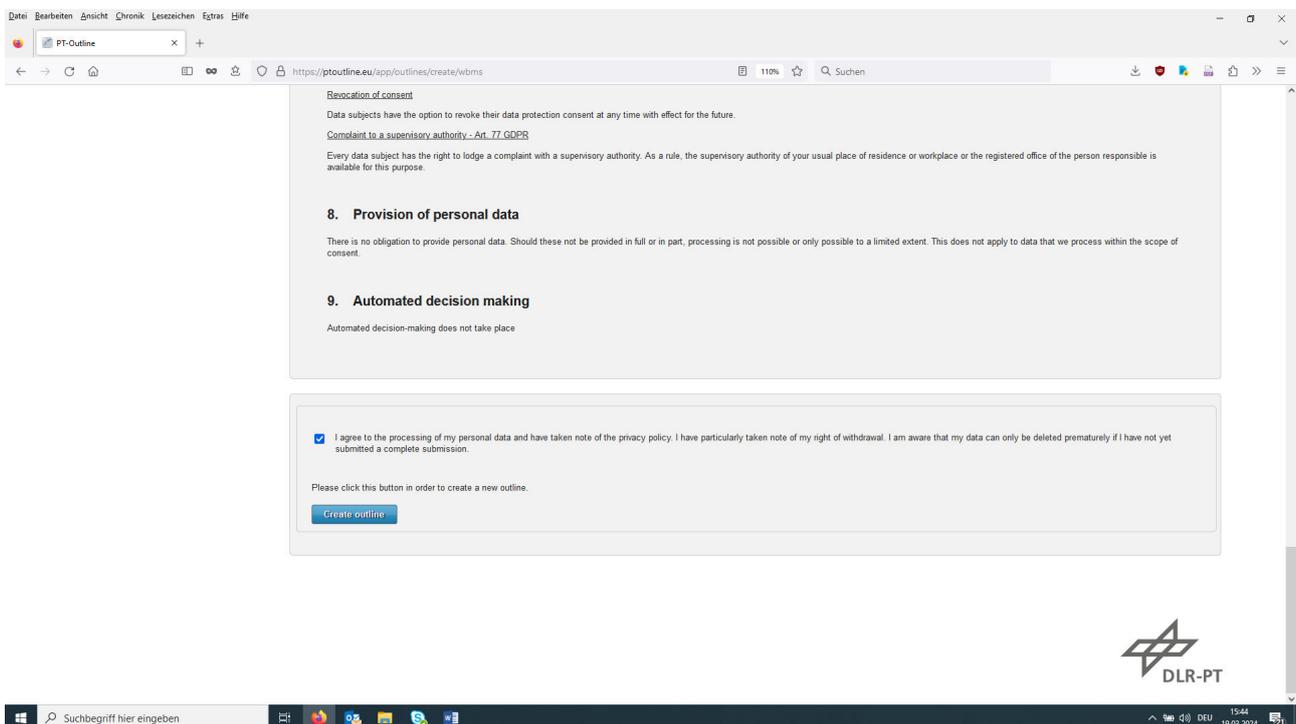
The German Aerospace Center (DLR) takes the protection of your personal data very seriously. The planned processing of your data for the purpose of application, implementation and evaluation of a project within the Western Balkan Mobility Scheme (WBMS) requires your previously granted consent as the legal basis.

I agree that DLR may process the designated personal data exclusively for the above-mentioned purposes.

My consent is voluntary. I can refuse it without giving reasons and without having to fear any disadvantages. I can also revoke this consent at any time in text form (e.g. letter, e-mail) with effect for the future. After receipt of the revocation, my data may not be further processed. The revocation of my consent does not affect the lawfulness of the processing carried out up to that point.

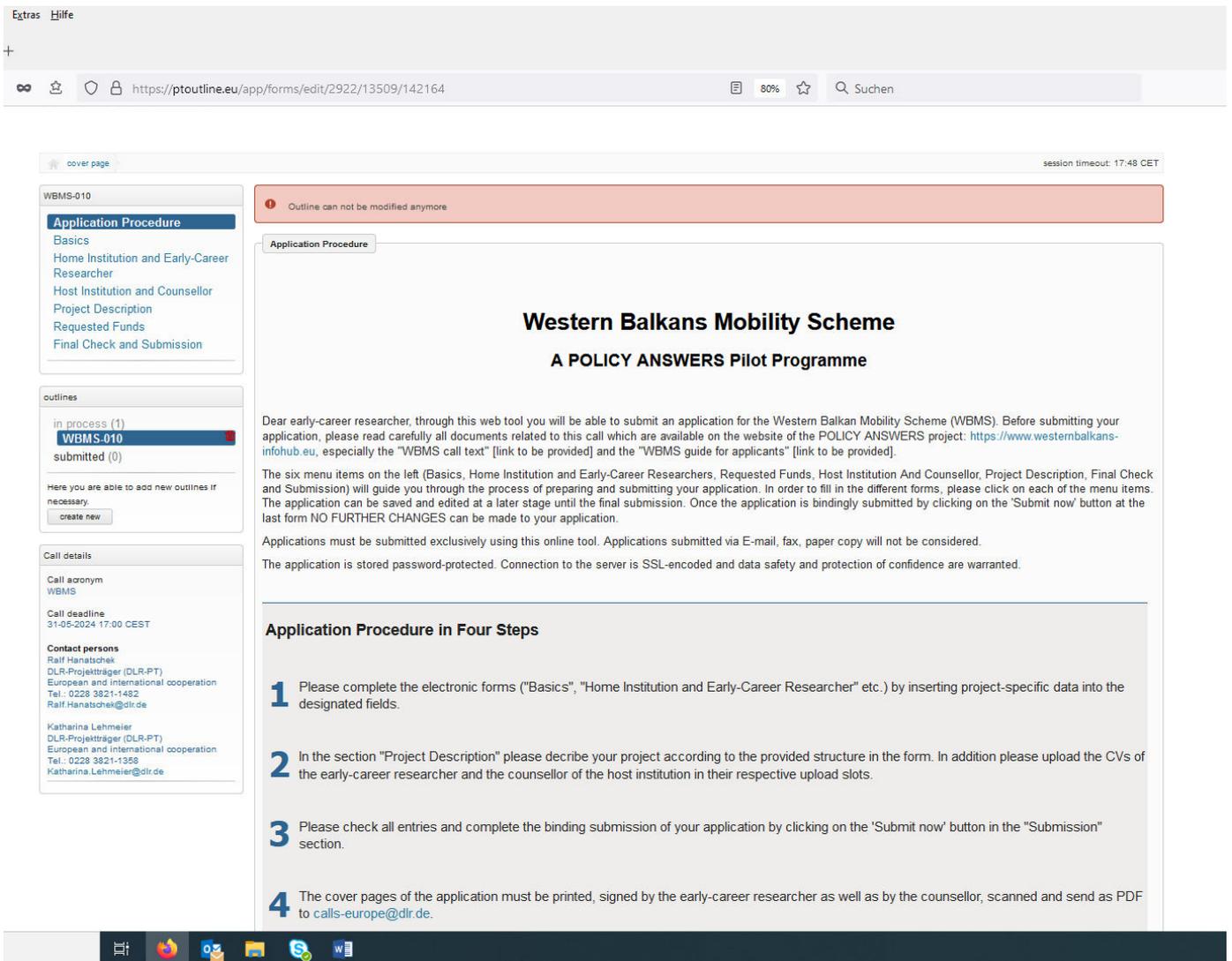
In order to enable you to make transparent decisions, we would like to inform you about how DLR processes your personal data with the following data protection information.

II. Information on the processing of personal data



The screenshot shows the continuation of the PT-Outline web application. It displays sections for "Revocation of consent" and "Complaint to a supervisory authority - Art. 77 GDPR". Below these is section "8. Provision of personal data" and "9. Automated decision making". At the bottom, there is a confirmation box with a checked checkbox and the text: "I agree to the processing of my personal data and have taken note of the privacy policy. I have particularly taken note of my right of withdrawal. I am aware that my data can only be deleted prematurely if I have not yet submitted a complete submission." Below this text is a blue button labeled "Create outline".

After logging in you have to accept the GDPR by ticking the confirm box.



Extras Hilfe

https://ptoutline.eu/app/forms/edit/2922/13509/142164

session timeout: 17:48 CET

WBMS-010

Application Procedure

- Basics
- Home Institution and Early-Career Researcher
- Host Institution and Counsellor
- Project Description
- Requested Funds
- Final Check and Submission

outlines

in process (1)

WBMS-010

submitted (0)

Here you are able to add new outlines if necessary.

create new

Call details

Call acronym
WBMS

Call deadline
31-05-2024 17:00 CEST

Contact persons
Ralf Hanatschek
DLR-Projektträger (DLR-PT)
European and international cooperation
Tel.: 0228 3821-1482
Ralf.Hanatschek@dlr.de

Katharina Lehmeier
DLR-Projektträger (DLR-PT)
European and international cooperation
Tel.: 0228 3821-1355
Katharina.Lehmeier@dlr.de

Western Balkans Mobility Scheme
A POLICY ANSWERS Pilot Programme

Dear early-career researcher, through this web tool you will be able to submit an application for the Western Balkan Mobility Scheme (WBMS). Before submitting your application, please read carefully all documents related to this call which are available on the website of the POLICY ANSWERS project: <https://www.westernbalkans-infohub.eu>, especially the "WBMS call text" [link to be provided] and the "WBMS guide for applicants" [link to be provided].

The six menu items on the left (Basics, Home Institution and Early-Career Researchers, Requested Funds, Host Institution And Counsellor, Project Description, Final Check and Submission) will guide you through the process of preparing and submitting your application. In order to fill in the different forms, please click on each of the menu items. The application can be saved and edited at a later stage until the final submission. Once the application is bindingly submitted by clicking on the 'Submit now' button at the last form NO FURTHER CHANGES can be made to your application.

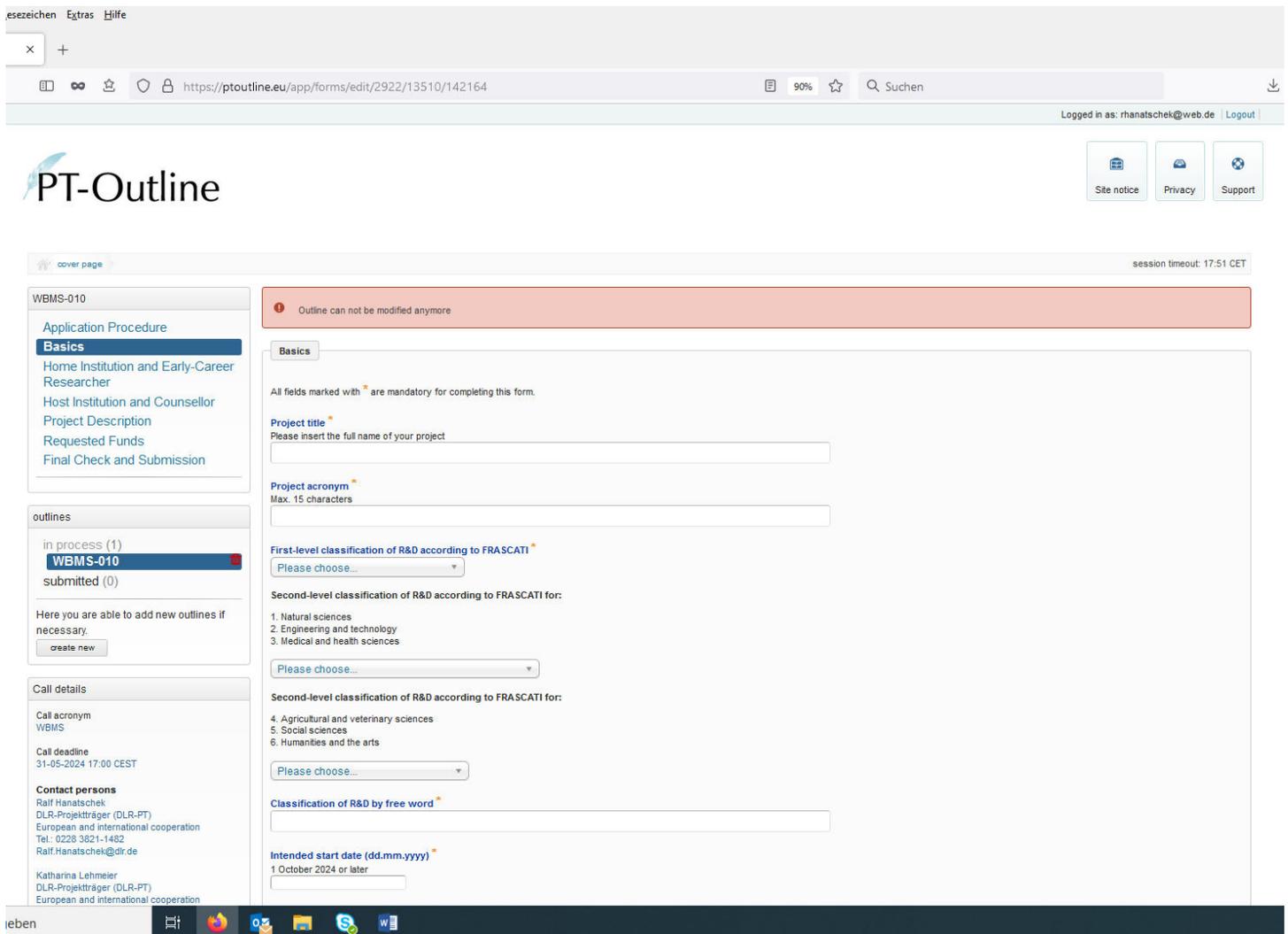
Applications must be submitted exclusively using this online tool. Applications submitted via E-mail, fax, paper copy will not be considered.

The application is stored password-protected. Connection to the server is SSL-encoded and data safety and protection of confidence are warranted.

Application Procedure in Four Steps

- 1 Please complete the electronic forms ("Basics", "Home Institution and Early-Career Researcher" etc.) by inserting project-specific data into the designated fields.
- 2 In the section "Project Description" please describe your project according to the provided structure in the form. In addition please upload the CVs of the early-career researcher and the counsellor of the host institution in their respective upload slots.
- 3 Please check all entries and complete the binding submission of your application by clicking on the 'Submit now' button in the "Submission" section.
- 4 The cover pages of the application must be printed, signed by the early-career researcher as well as by the counsellor, scanned and send as PDF to calls-europe@dlr.de.

This page gives a general overview of the individual menu items and some general information on the Western Balkans Mobility Scheme and outlines the four steps to the successful application.



PT-Outline

session timeout: 17:51 CET

WBMS-010

Application Procedure

Basics

Home Institution and Early-Career Researcher

Host Institution and Counsellor

Project Description

Requested Funds

Final Check and Submission

Outlines

in process (1)

WBMS-010

submitted (0)

Here you are able to add new outlines if necessary.

[create new](#)

Call details

Call acronym
WBMS

Call deadline
31-05-2024 17:00 CEST

Contact persons
Ralf Hanatschek
DLR-Projekträger (DLR-PT)
European and international cooperation
Tel.: 0228 3821-1482
Ralf.Hanatschek@dlr.de
Katharina Lehmeier
DLR-Projekträger (DLR-PT)
European and international cooperation

Basics

Outline can not be modified anymore

All fields marked with * are mandatory for completing this form.

Project title *
Please insert the full name of your project

Project acronym *
Max. 15 characters

First-level classification of R&D according to FRASCATI *
Please choose...

Second-level classification of R&D according to FRASCATI for:

1. Natural sciences
2. Engineering and technology
3. Medical and health sciences

Please choose...

Second-level classification of R&D according to FRASCATI for:

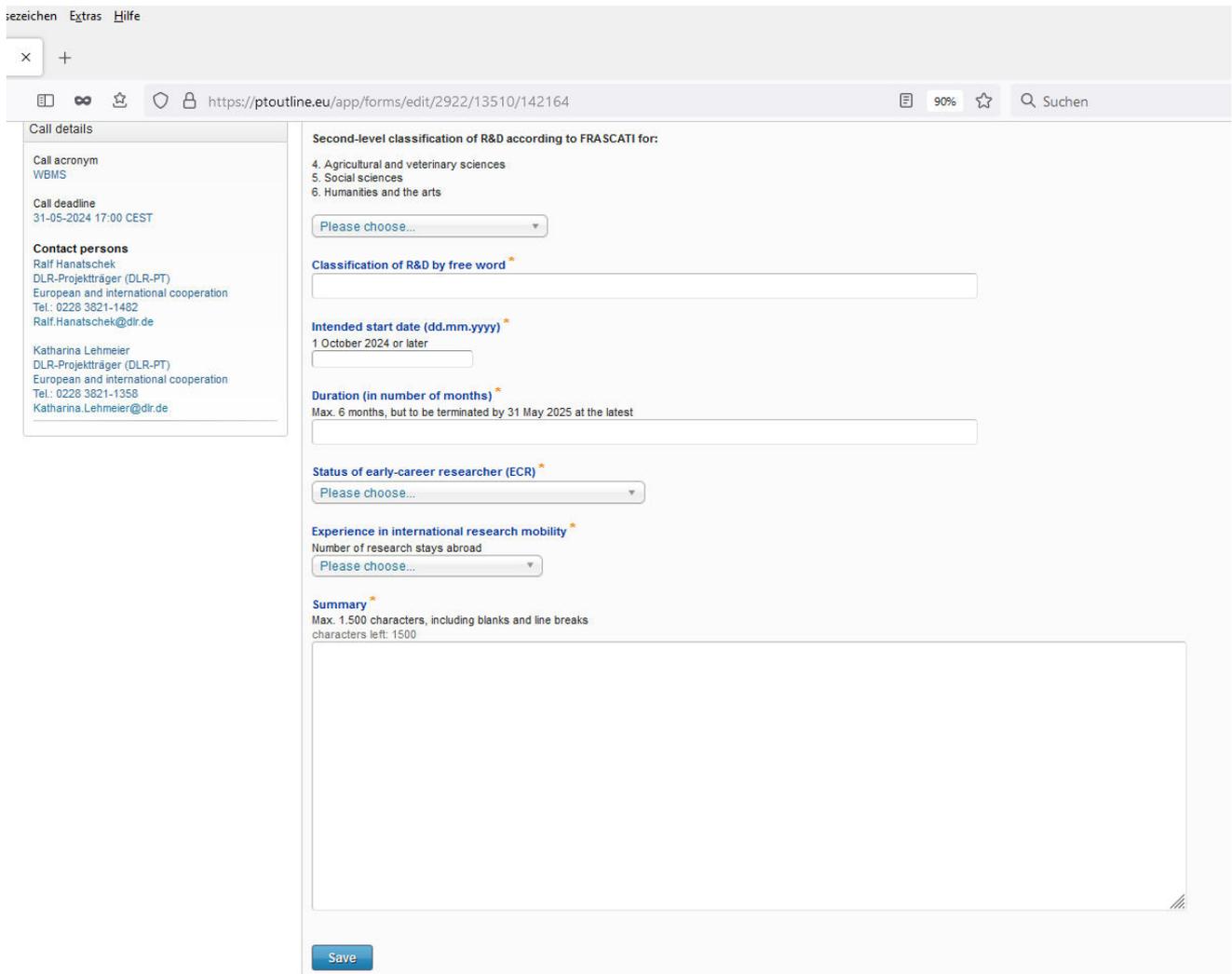
4. Agricultural and veterinary sciences
5. Social sciences
6. Humanities and the arts

Please choose...

Classification of R&D by free word *

Intended start date (dd.mm.yyyy) *
1 October 2024 or later

On this page, you can start entering information about your planned project. The screenshot above shows the upper part of the Basics form. Basic project data include an acronym and the title of your WBMS project. Please indicate to which thematic R&I area according to the Frascati classification your project belongs. Please note assigning the correct thematic area will be necessary on two levels: A broader one and a detailed one. This information is not only relevant for statistical reasons but will be a decisive factor when assigning reviewers to your proposal.



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https://ptoutline.eu/app/forms/edit/2922/13510/142164 90% Suchen

Call details

Call acronym
WBMS

Call deadline
31-05-2024 17:00 CEST

Contact persons

Ralf Hanatschek
DLR-Projektträger (DLR-PT)
European and international cooperation
Tel.: 0228 3821-1482
Ralf.Hanatschek@dlr.de

Katharina Lehmeier
DLR-Projektträger (DLR-PT)
European and international cooperation
Tel.: 0228 3821-1358
Katharina.Lehmeier@dlr.de

Second-level classification of R&D according to FRASCATI for:

4. Agricultural and veterinary sciences
5. Social sciences
6. Humanities and the arts

Please choose...

Classification of R&D by free word*

Intended start date (dd.mm.yyyy)*

1 October 2024 or later

Duration (in number of months)*

Max. 6 months, but to be terminated by 31 May 2025 at the latest

Status of early-career researcher (ECR)*

Please choose...

Experience in international research mobility*

Number of research stays abroad

Please choose...

Summary*

Max. 1.500 characters, including blanks and line breaks
characters left: 1500

Save



The screenshot above shows the lower part of the Basics form. The planned starting date is only indicative and will be determined once the contract is concluded, if your application is selected for funding. However, all WBMS projects have to be completed until 31 May 2025 at the latest in order to ensure the evaluation of the WBMS. Since the WBMS is a POLICY ANSWERS pilot programme this evaluation process and the preparation of policy recommendations is of high importance in order to find regional, economy-level or international donors for a possible follow-up measure.

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https://ptoutline.eu/app/forms/edit/2922/13561/142164 80% Suchen

WBMS-010

- Application Procedure
- Basics
- Home Institution and Early-Career Researcher
- Host Institution and Counsellor
- Project Description
- Requested Funds
- Final Check and Submission

outlines

in process (1)

WBMS-010

submitted (0)

Here you are able to add new outlines if necessary.

[create new](#)

Call details

Call acronym
WBMS

Call deadline
31-05-2024 17:00 CEST

Contact persons

Ralf Hanatschek
DLR-Projektträger (DLR-PT)
European and international cooperation
Tel.: 0228 3821-1482
Ralf.Hanatschek@dlr.de

Katharina Lehmeier
DLR-Projektträger (DLR-PT)
European and international cooperation
Tel.: 0228 3821-1358
Katharina.Lehmeier@dlr.de

! Outline can not be modified anymore

Home Institution and Early-Career Researcher

All fields marked with * are mandatory for completing this form.

Information about the home institution

Legal name *

Short name *

Description of the home institution *

Max. 1.500 characters, including blanks and line breaks
characters left: 1500

Registration number

Link to registry

Accreditation number *

Link to accreditation registry

Organisation type *

Please choose...

Other organisation type

If you choose "other" for field "Organisation type" (above), please specify

Street, no. *

The screenshot above shows the upper part of the Home Institution and Early-Career Researcher form. Here information is requested first about the home institution to which the applicant is affiliated.

u/app/forms/edit/2922/13561/142164 80% ☆ Suchen

Postal code *

Town *

Economy *
* this designation is without prejudice to positions on status, and is in line with UNSC 1244 and the ICJ Opinion on the Kosovo Declaration of Independence

Please choose... ▾

Organisation website *

Information about the early-career researcher

Title *

Please choose... ▾

Family name *

First name *

Gender *

Please choose... ▾

Street, no. *

Postal code *

Town *

Economy *
* this designation is without prejudice to positions on status, and is in line with UNSC 1244 and the ICJ Opinion on the Kosovo Declaration of Independence

Please choose... ▾

Phone *
First, enter your country code, e.g. +49, after the slash enter your phone number e.g. +49/1234567890

E-mail (business) *

E-mail (private)

Save

This is the lower part of the Home Institution and Early-Career Researcher form in which secondly information about the applicant, the early-career researcher him-/ or herself has to be filled in.

Extras Hilfe

https://ptoutline.eu/app/forms/edit/2922/13512/142164 80% Suchen

WBMS-010

- Application Procedure
- Basics
- Home Institution and Early-Career Researcher
- Host Institution and Counsellor**
- Project Description
- Requested Funds
- Final Check and Submission

outlines

in process (1)

WBMS-010

submitted (0)

Here you are able to add new outlines if necessary.

[create new](#)

Call details

Call acronym
WBMS

Call deadline
31-05-2024 17:00 CEST

Contact persons
 Ralf Hanatschek
 DLR-Projektträger (DLR-PT)
 European and international cooperation
 Tel.: 0228 3821-1482
 Ralf.Hanatschek@dlr.de

Katharina Lehmeier
 DLR-Projektträger (DLR-PT)
 European and international cooperation
 Tel.: 0228 3821-1358
 Katharina.Lehmeier@dlr.de

Host Institution and Counsellor

All fields marked with * are mandatory for completing this form.

Information about the host institution

Legal name *

Short name *

Description of the host institution and research infrastructure *
 Max. 1.500 characters, including blanks and line breaks
 characters left: 1500

Registration number *

Link to registry

Organisation type *

Please choose...

Other organisation type
 If you choose "other" for field "Organisation type" (above), please specify

Street, no. *

Postal code *

Town *

tline.eu/app/forms/edit/2922/13512/142164 80% Suchen

Postal code *

Town *

Economy *
* this designation is without prejudice to positions on status, and is in line with UNSC 1244 and the ICJ Opinion on the Kosovo Declaration of Independence

Please choose...

Organisation website *

Information about the counsellor

For address and contact details please use those at the host institution only (no private information necessary)

Title *

Please choose...

Family name *

First name *

Gender *

Please choose...

Street, no. *

Postal code *

Town *

Economy *
* this designation is without prejudice to positions on status, and is in line with UNSC 1244 and the ICJ Opinion on the Kosovo Declaration of Independence

Please choose...

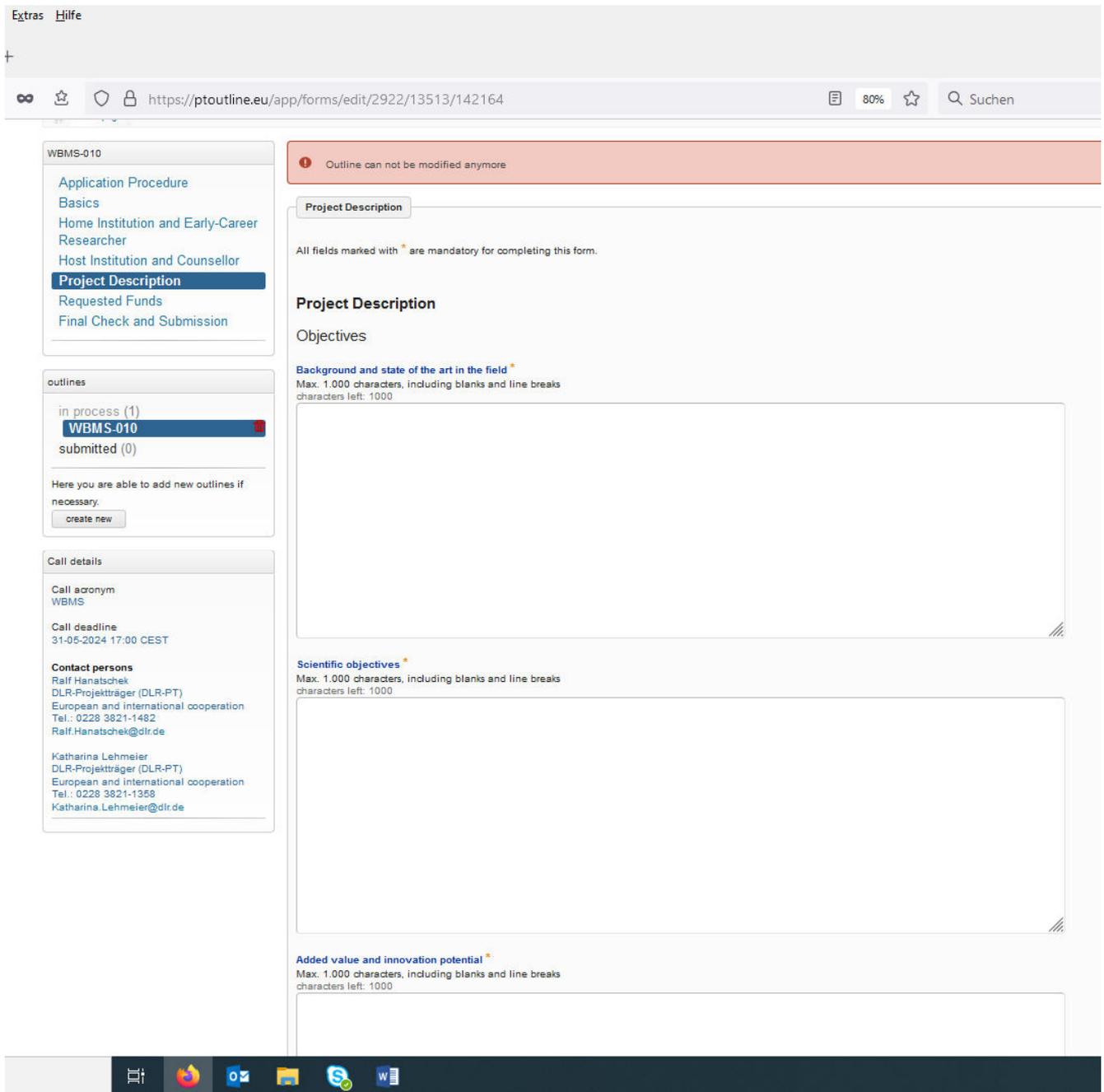
Phone *
First, enter your country code, e.g. +49, after the slash enter your phone number e.g. +49/1234567890

E-mail *

Save



Above the lower part of the form is presented.



The screenshot shows a web browser window with the URL <https://ptoutline.eu/app/forms/edit/2922/13513/142164>. The page title is "Extras Hilfe". A red banner at the top of the form area states: "Outline can not be modified anymore".

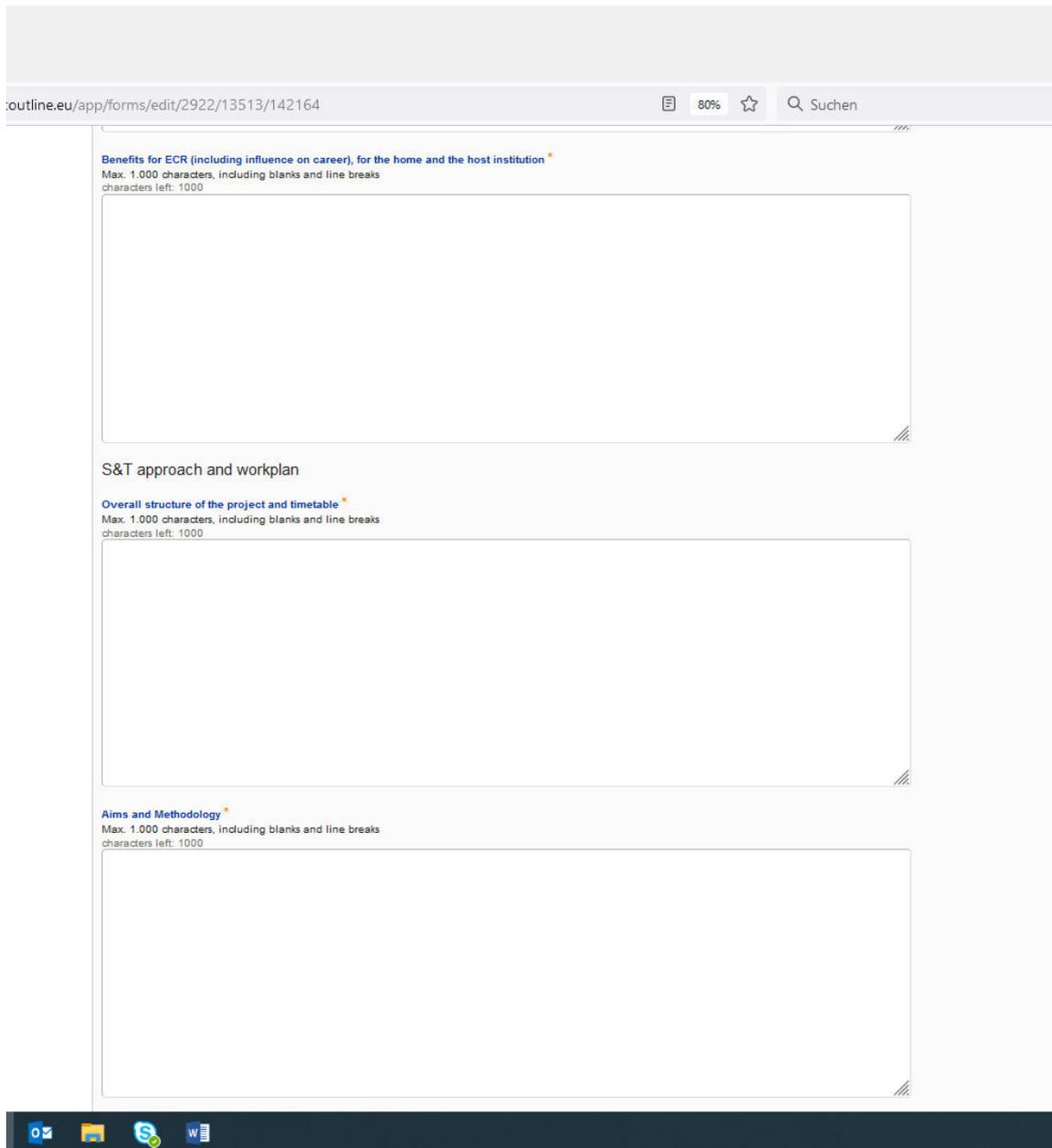
The left sidebar contains a navigation menu for "WBMS-010" with the following items: Application Procedure, Basics, Home Institution and Early-Career Researcher, Host Institution and Counsellor, **Project Description** (highlighted), Requested Funds, and Final Check and Submission. Below this is a section for "outlines" showing "in process (1)" with "WBMS-010" selected, and "submitted (0)". A "create new" button is present. The "Call details" section shows the call acronym "WBMS", a call deadline of "31-05-2024 17:00 CEST", and contact persons: Ralf Hanatschek (DLR-Projektträger, DLR-PT, European and international cooperation, Tel.: 0228 3821-1482, Ralf.Hanatschek@dlr.de) and Katharina Lehmeier (DLR-Projektträger, DLR-PT, European and international cooperation, Tel.: 0228 3821-1358, Katharina.Lehmeier@dlr.de).

The main form area is titled "Project Description" and includes a note: "All fields marked with * are mandatory for completing this form." The form contains three sections:

- Project Description**: Objectives
- Background and state of the art in the field ***: Max. 1.000 characters, including blanks and line breaks. characters left: 1000
- Scientific objectives ***: Max. 1.000 characters, including blanks and line breaks. characters left: 1000
- Added value and innovation potential ***: Max. 1.000 characters, including blanks and line breaks. characters left: 1000

The bottom of the screenshot shows a Windows taskbar with icons for File Explorer, Firefox, Outlook, and other applications.

The screenshot above shows the upper part of the Project Description form, while...



outline.eu/app/forms/edit/2922/13513/142164

80% ☆ 🔍 Suchen

Benefits for ECR (including influence on career), for the home and the host institution *
Max. 1.000 characters, including blanks and line breaks
characters left: 1000

S&T approach and workplan

Overall structure of the project and timetable *
Max. 1.000 characters, including blanks and line breaks
characters left: 1000

Aims and Methodology *
Max. 1.000 characters, including blanks and line breaks
characters left: 1000

...this screenshot presents the middle part of this form and...

eu/app/forms/edit/2922/13513/142164 80% Suchen

Results and milestones *

Max. 1.000 characters, including blanks and line breaks
characters left: 1000

Dissemination and exploitation

Dissemination and exploitation (incl. Intellectual Property Rights (IPR), if applicable) *

Max. 3.000 characters, including blanks and line breaks
characters left: 3000

Upload of CVs

Please use the EUROPASS structure (<https://europa.eu/europass/en/create-europass-cv>) for the preparation of the CVs.

Please note that only files in pdf-format are accepted for upload. During the upload your file name will be changed. If you have uploaded a document earlier, this file will be overwritten by any subsequent upload. Your file should not exceed 20 Mb in size. It may take some minutes to complete the upload.

Upload CV of the early-career researcher *

Keine Datei ausgewählt.

Upload CV of the counsellor *

Keine Datei ausgewählt.



...this is the last part of the Project Description form. Please note that in addition to the description of your project, it is mandatory to upload CVs in EUROPASS format of the applicant and the counsellor.

Extras [Hilfe](#)

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Basics

- Home Institution and Early-Career Researcher
- Host Institution and Counsellor
- Project Description
- Requested Funds**
- Final Check and Submission

outlines

in process (1)

WBMS-010

submitted (0)

Here you are able to add new outlines if necessary.

[create new](#)

Call details

Call acronym
WBMS

Call deadline
31-05-2024 17:00 CEST

Contact persons

Ralf Hanatschek
DLR-Projekträger (DLR-PT)
European and international cooperation
Tel.: 0229 3921-1492
Ralf.Hanatschek@dlr.de

Katharina Lehmeier
DLR-Projekträger (DLR-PT)
European and international cooperation
Tel.: 0229 3921-1398
Katharina.Lehmeier@dlr.de

Requested Funds

All fields marked with * are mandatory for completing this form.

Requested funds

Please check with the "WBMS call text" and the "WBMS guide for applicants" regarding eligibility and calculation of respectice cost. Please note that the financial support will be given as a grant with a maximum sum of EUR 5,000 per project. Please enter figures in full EURO (without cents) and with a "," as thousands separator. If you do not have any costs in a specific category please type in „0“.

Requested funds for allowance unit costs (EUR) *

Description, calculation and justification of allowance unit costs *

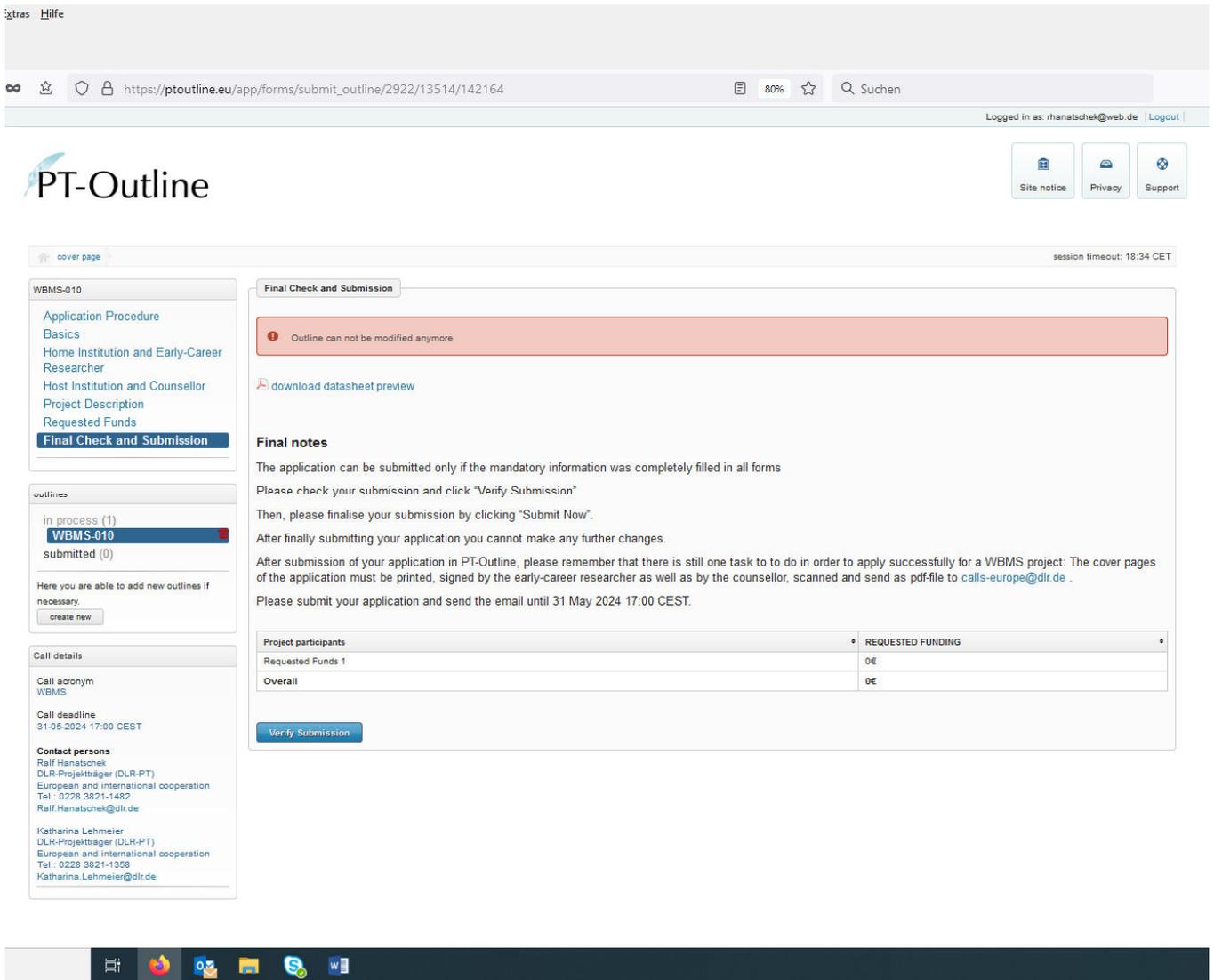
Requested funds for costs for access to and use of research infrastructure at host institution (EUR) *

Description, calculation and justification of costs for access to and use of research infrastructure at host institution *

Requested funds for costs for exploitation of project results (EUR) *

Description, calculation and justification of costs for exploitation of project results *

At the Requested Funds form you are asked to name the required funds in each of the three cost categories and give explanations how you calculated these amount as well as justifications for it. The three amounts are summed up automatically to arrive at the total sum requested.



Extras Hilfe

https://ptoutline.eu/app/forms/submit_outline/2922/13514/142164 80% Suchen

Logged in as: rhanatschek@web.de Logout

PT-Outline Site notice Privacy Support

cover page session timeout: 18:34 CET

WBMS-010

- Application Procedure
- Basics
- Home Institution and Early-Career Researcher
- Host Institution and Counsellor
- Project Description
- Requested Funds
- Final Check and Submission**

outlines

in process (1)

WBMS-010

submitted (0)

Here you are able to add new outlines if necessary.

create new

Call details

Call acronym
WBMS

Call deadline
31-05-2024 17:00 CEST

Contact persons

Ralf Hanatschek
DLR-Projektträger (DLR-PT)
European and international cooperation
Tel.: 0228 3821-1482
Ralf.Hanatschek@dlr.de

Katharina Lehmeier
DLR-Projektträger (DLR-PT)
European and international cooperation
Tel.: 0228 3821-1358
Katharina.Lehmeier@dlr.de

Final Check and Submission

Outline can not be modified anymore

download datasheet preview

Final notes

The application can be submitted only if the mandatory information was completely filled in all forms

Please check your submission and click "Verify Submission"

Then, please finalise your submission by clicking "Submit Now".

After finally submitting your application you cannot make any further changes.

After submission of your application in PT-Outline, please remember that there is still one task to do in order to apply successfully for a WBMS project: The cover pages of the application must be printed, signed by the early-career researcher as well as by the counsellor, scanned and send as pdf-file to calls-europe@dlr.de.

Please submit your application and send the email until 31 May 2024 17:00 CEST.

Project participants	REQUESTED FUNDING
Requested Funds 1	0€
Overall	0€

Verify Submission

The screenshot above shows the Final Check and Submission form. This is last form, in which you are provided with an overview of the requested funds. In addition, you have the opportunity to generate a data sheet preview with all the information you have entered so far. Please make sure you read and observe the instructions set out in the checklist. Before you are able to submit your application you have to verify whether you filled all mandatory fields. Only after a successful pass you are able to submit.

After submission of your application in PT-Outline, please remember that there is still one task to do in order to apply successfully for a WBMS project: The cover pages of the application must be printed, signed by the early-career researcher as well as by the counsellor, scanned and send as pdf-file to calls-europe@dlr.de.

Please submit your application and send the email until ~~31 May 2024 17:00 CEST~~ **26 June 2024, 17:00 CEST**.

Annex

A1 Financial Support Contract Form (DRAFT)

A2 Letters of Confirmation of Home and Host institution (DRAFT)

A3 Financial Support to Third Parties (FSTP) Annex to Financial Support Contract Form (DRAFT)

6.4 WBMS call text

Western Balkans Mobility Scheme

A POLICY ANSWERS Pilot Programme

Call text

!!Please note that the deadline of this scheme is prolonged until 26 June 2024, 17:00 CEST!!

1. Aim and objectives

Funded under Horizon Europe, the project entitled POLICY ANSWERS - R&I POLICY making, implementation ANd Support in the WEsteRn BalkanS (<https://www.westernbalkans-infohub.eu/about/>) was launched on 1 March 2022. Positioned well in line with the EU Western Balkans¹ (WB) Agenda on Innovation, Research, Education, Culture, Youth and Sport (WB Agenda), POLICY ANSWERS monitors and supports policy coordination within the EU-WB cooperation, but also provides capacity building and pilot actions in the WB to contribute to the region's EU integration process and to strengthen their innovation ecosystems.

This pilot regional mobility scheme launched by POLICY ANSWERS has a call budget of EUR 100,000. It should build the foundation for a follow-up measure to be funded by regional, economy-level or international stakeholders. The aim of this scheme is to enhance regional cooperation and sustained support in mobility-driven R&I and - by fostering the interconnectedness of the WB - to support sustainable economic growth, a common regional market, societal resilience and convergence of the WB with the EU. Enhanced cooperation and sustained support in mobility-driven R&I are also pivotal for equipping the WB with the requisite tools and knowledge to address shared challenges, such as climate change and digital transformation, while fostering a generation of innovators who can reshape the region's future.

These aims should be achieved by fostering brain circulation and encourage brain retention within the WB at an early stage of the researchers' careers. The young researchers will initiate new contacts and networks to strengthen the links between the regions' economies and build

¹ The Western Balkans comprise Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia.

* This designation is without prejudice to positions on status, and is in line with UNSC 1244 and the ICJ Opinion on the Kosovo Declaration of Independence.

new bridges between them. Additionally, this scheme will support excellence in research in the WB. Furthermore, it will promote and support the Open Access use of the huge amount of underused research infrastructure (facilities, resources and services) across the WB.

This mobility scheme is supported by the Danube Rectors' Conference (DRC, <https://www.drc-danube.org>) and the Rectors' Forum of Southeast Europe and Western Balkans (RF SEEWB, <https://www.uni-lj.si/study/rectors-forum-SEE-WB>).

2. Type of projects

A project within this scheme must fulfil each of these three criteria: It must use (1) short-term mobility within the WB and (2) specialised equipment or facilities (research infrastructures) in another WB economy in order to (3) do research. Only mobility projects in the field of research will be funded.

Mobility must comprise the physical presence of an early-career researcher - as the recipient of the financial support - for a duration of between two weeks and two months at a location in a different WB economy, that allows access to a research infrastructure. The overall duration of the project must be between two weeks and six months, which allows enough time for the exploitation of the results of the mobility. During the project several visits to the same RI are eligible, but not to a different RI in the same or in another WB economy.

This scheme addresses early-career researchers (ECR) only, which means that only PhD students and Postdocs, whose doctorate was awarded no longer than seven years before the deadline of this call, are eligible as applicants. The ECR must be affiliated to a home institution, which must be located in the WB. The home institution must be a research performing organisation (RPO) or higher education institutions (HEI) (public or private) that has to be registered and accredited in the WB. Companies are not eligible as home institution. In order to initiate a sustainable and long-term cooperation between the home and the host institution, it is encouraged that the ECR be involved in accompanying activities at the host institution like training, capacity building, soft skill development etc.

By definition, a research infrastructure is a set of facilities, resources and services that are used by the research communities to conduct research and foster innovation in their respective fields. It includes: major scientific equipment (or sets of instruments), knowledge-based resources such as collections, archives and scientific data, e-infrastructures, such as data and computing systems and communication networks and any other tools that are essential to achieve excellence in research and innovation^{2,3}.

All public or private RPOs or HEI in the WB that are registered in one WB economy under the respective law and provide research infrastructures (as defined above) are eligible as host institution for the recipient; this includes virtual research infrastructures, if an added value

² According to Article 2 (6) of the Regulation (EU) No 1291/2013 of 11 December 2013-“Establishing Horizon 2020 - the Framework Programme for Research and Innovation 2014-2020”.

³ The recent RCC report “Western Balkans Research and Innovation Infrastructure Roadmap” gives a first overview on research infrastructures in the WB at <https://www.rcc.int/pubs/149/western-balkans-research-and-innovation-infrastructure-roadmap> and <https://www.rcc.int/pubs/144/a-framework-for-research-infrastructure-roadmaps>.

of the mobility is evident. The hosting institution is obliged to provide a counsellor (which could be a mentor or a peer) as central contact person for the ECR.

In order to boost the regional cooperation, all thematic research areas are eligible (including Social Sciences and Humanities (SSH) and arts-based research). Applications that address the twin transition (green and digital) of the WB and priorities mentioned in research strategies of the WB economies (respective Smart Specialisation Strategies/S3) are particularly welcome. The project must have a civilian purpose.

The financial support for the recipients is given according to the Horizon Europe regulations for Financial Support to Third Parties. This means that the following regulations in the POLICY ANSWERS grant agreement (GA) also apply to the recipient, who has to:

- (1) prevent that the implementation of the project is compromised for reasons involving family, emotional life, political or ethnic affinity etc. ('conflict of interests', article 12 GA),
- (2) keep confidential any data, documents or other material that is identified as sensitive in writing ('sensitive information') ('confidentiality and security', article 13 GA),
- (3) carry out the action in line with the highest ethical standards and to commit to and ensure the respect of basic EU values (such as respect for human dignity, freedom, democracy etc.) ('ethics and values', article 14 GA),
- (4) acknowledge the EU support and display the European flag (emblem) and funding statement in all communication activities related to the action like media relations, conferences, seminars etc ('communication, dissemination and visibility', article 17.2 GA),
- (5) provide any information requested in order to verify eligibility of the costs or contributions declared, proper implementation of the action etc. ('general information obligations', article 19 GA),
- (6) keep records and other supporting documents to prove the proper implementation of the action ('record-keeping', article 20 GA),
- (7) accept that the granting authority - the European Commission - and other European bodies as the European Anti-Fraud Office (OLAF) etc. may also carry out checks, project reviews, audits and investigations during the action or afterwards ('checks, reviews, audits and investigations – extension of findings', article 25 GA).

Further information is available in the draft of the “financial support contract” of this scheme as part of the “guide for applicants”.

The recipients and the counsellors are obliged to participate in evaluative measures and to provide information for the evaluation of the success of the funding measure.

3. Type, scope and amount of funding

The financial support will be given as a grant with a maximum sum of EUR 5,000 per project. The funding will be given as non-refundable grant in two instalments, with a first share as pre-financing (75%), and a second share after approval of the final report (25%).

Eligible costs are supported by:

- (1) an "allowance unit cost" of EUR 75 per day of the stay - resulting in EUR 2,250 per month (30 days) - to compensate for all travel costs and living allowances of the recipient (including cost for visa etc.);
- (2) any cost that occurs at the host institution like accession fees, consumables etc.;
- (3) costs for exploitation of project results (visibility, publication of scientific article, etc.);

Costs of category (2) and (3) are accounted for as direct costs only (with VAT) that have to be actual, economic and necessary.

Health, accident and personal liability insurances for the time of mobility have to be taken out by the recipients at their own expense.

The financial support may not be used to cover costs that are already covered by other sources. The financial support is not renewable.

4. Application

Applications have to be submitted by the ECR via the web-based Call Management System PT-Outline only (<https://ptoutline.eu/app/wbms>) and will be following a one-stage procedure. Applications must be in English and signed by the ECR and the counsellor of the hosting institution.

Main elements of applications are information on the (a) project basics, (b) home institution and the ECR, (c) host institution and counsellor, (d) objectives of the project and its workplan and (e) requested funds. In addition, CVs of the ECR and the counsellor (in EUROPASS format) have to be uploaded. Applications must be in English and signed by the ECR and the counsellor. A scan of the pages with the signatures will be sufficient. Further information is provided in the "guide for applicants".

All team members of the POLICY ANSWERS project are not eligible to apply.

The deadline for submission of applications is ~~31 May 2024, 17:00 CEST~~ **prolonged until 26 June 2024, 17:00 CEST.**

5. Assessment and selection of applications

The applications will be assessed through a one-stage process with independent experts. External reviewers with a high level of professional experience in the public or private R&D sector will assess the applications in a remote assessment according to the assessment criteria which are specified below. A minimum of two reviewers will be assigned to each application. In case of major deviations, a third peer reviewer will be engaged and the review that differs the most from the mean of the three reviews will be discarded.

Assessment criteria will be based on the three weighted criteria excellence (40%), impact (40%) and quality and efficiency of the implementation (20%):

(1) Excellence (threshold 3/5):

- Clarity and pertinence of the project's research and innovation approach and objectives as well as the soundness of the proposed methodology;
- Quality of the home institution, and of the host institution and its research infrastructure;
- Extent and quality of the accompanying activities at the host institution like training, capacity building, soft skill development;

(2) Impact (threshold 3/5):

- Quality of expected research outputs and relevance to regional, economy-level or local policy context;
- Quality of the measures to enhance the career perspectives and employability of the ECR and contribution to his/her skills development;
- Suitability and quality of the measures to maximise the exploitation of the research results and its visibility;
- Contribution to the establishment of joint follow-up measures and long-term co-operations;

(3) Quality and efficiency of the implementation (threshold 3/5):

- Quality and effectiveness of the work plan, hosting arrangements and allocation of resources;
- Complementarity of the role and the benefits of all three stakeholders (ECR, home and host institution).

Based on the assessment results, a ranking list of the applications will be drawn up and given to the POLICY ANSWERS Steering Group as a funding recommendation. The Steering Group consists of nine participants, with one representative from the ministry responsible for research within each WB economy and three representatives from regional organisations. The Steering Group will decide about applications to be funded (and those to put on the reserve list).

Adjustments of the ranking list are allowed only if a) applications are located at the same rank or very close together and b) based on geographical balance between the WB economies and within the WB economies and/or based on inclusivity. While the geographical balance between the WB economies should ensure an evenly regional distribution of the selected applicants and a regional success of the scheme, the balance within the economies should ensure that not only home institutions in the capitals are supported, but also those in more remote areas of the respective WB economy. The aspect of inclusivity should ensure gender balance (at least a 30:70 ratio should be realised between women/men and vice versa) and benefits for those ECR with little or no experience in international mobility.

All applicants will be informed about the selection result in writing.

6. Contracting and reporting

The basis for the financial support will be a bilateral contract between the DLR Projektträger (DLR-PT) functioning as call secretariat and the recipient (the ECR of a project selected for funding) with Letters of Intent (LoI) of the home and the host institution - signed and stamped by the respective legal representative of these institutions - as integral part of the agreement. The financial support will go directly to the recipient.

The recipient must provide one technical and financial report at the end of the project, which has to include a standardised confirmation letter by the counsellor at the end of the project, validating the stay of the recipient and its length.

7. Timeline

Publication of the call: 28 March 2024

Deadline for submission of applications: ~~31 May 2024, 17:00 CEST~~ **prolonged until 26 June 2024, 17:00 CEST.**

Envisaged funding decision: ~~August~~ **September** 2024

Envisaged start of the projects: ~~1 October to~~ **1 November until 1 December** 2024

8. Jurisdiction

The place of jurisdiction is Bonn, Germany. In the event of dispute, German Law shall be applicable.

9. Further information and counselling

The call secretariat will be located at DLR Projektträger (DLR-PT), Heinrich-Konen-Strasse 1, 53227 Bonn, Germany.

Further information is available at <https://www.westernbalkans-infohub.eu/calls/western-balkans-mobility-scheme/> and from the DLR-PT via email to calls-europe@dlr.de and via phone call to +49 228 3821 1482 or 1358.



ABOUT POLICY ANSWERS

POLICY ANSWERS (R&I POLICY making, implementation ANd Support in the WEsteRn BalkanS) supports policy coordination in the Western Balkans and with the EC and the EU. 14 partner organisations, representing network nodes in the region and EU expert organisations, support policy dialogue through formal meetings (such as ministerial and steering platform and ad-hoc policy meetings), monitoring and agenda setting, capacity building and implementation of the EU's Western Balkan Agenda, as well as the alignment of thematic priorities. The project implements regional pilot activities and offers an information hub based on the westernbalkans-infohub.eu online information platform. The partners provide analytical evidence via monitoring and mapping activities of the stakeholder ecosystem, of the implementation of the Western Balkans Agenda and of the Western Balkans' integration into the European Research Area as well as via strategic foresight. POLICY ANSWERS also allows for tailored and targeted capacity building activities in the Western Balkans as well as regional alignment of priorities in relation to the digital transformation, the green agenda and towards healthy societies. Pilot activities provide learning opportunities on policy and programme level and reach out to final beneficiaries related to improved academia-industry cooperation, researcher mobility, inclusion of youth in policy processes, promotion of research infrastructures and increased innovation skills in all areas.

