



IRISH RESEARCH COUNCIL
An Chomhairle um Thaighde in Éirinn



CAROLINE
Collaborative Research Fellowships
for a Responsive and Innovative Europe



**IRISH RESEARCH COUNCIL COLLABORATIVE RESEARCH FELLOWSHIPS
FOR A RESPONSIVE AND INNOVATIVE EUROPE 'CAROLINE' – CO-FUNDED
BY MARIE SKŁODOWSKA-CURIE ACTIONS**

2018

TERMS AND CONDITIONS

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TERMS AND CONDITIONS

1. DEFINITIONS

- 1.1 **Academic mentor** shall mean the person or persons responsible for supporting and mentoring the fellow and ensuring the academic quality of the research produced under the fellowship. An academic mentor should be an academic staff member of the proposed home host organisation and should be expected to be employed by the proposed home host organisation for the entire duration of the fellowship. Academic mentors are permitted to support more than one fellow under each of the two types of CAROLINE fellowships available in the call.
- 1.2 **Associated country (AC)** shall mean a country which is not a European Union (EU) member state and which is associated with Horizon 2020. A list of ACs is published by the European Commission and is [available online](#)¹.
- 1.3 **CAROLINE** is the project title for the Irish Research Council Collaborative Research Fellowships for a Responsive and Innovative Europe, co-funded by Marie Skłodowska-Curie Actions².
- 1.4 **Council** shall mean the Irish Research Council.
- 1.5 **Experienced researcher** is a person in possession of a doctoral degree or a person with at least four years of full-time equivalent research experience at the time of recruitment.
- 1.6 **Fellow** or **CAROLINE fellow** shall mean the person awarded a CAROLINE fellowship. CAROLINE fellows will be 'Marie Skłodowska-Curie fellows'.
- 1.7 **Fellowship** or **CAROLINE fellowship** shall mean the Irish Research Council CAROLINE Collaborative Research Fellowship for a Responsive and Innovative Europe, co-funded by Marie Skłodowska-Curie Actions as outlined in the Letter of Offer.
- 1.8 **Fellowship fund** shall mean the funding for the fellowship.
- 1.9 **Full-time equivalent research experience** is measured from the date when a researcher obtained the degree which would formally entitle him or her to embark on a doctorate, either in the country in which the degree was obtained or in the country in which the researcher is recruited or seconded to.
- 1.10 **Funding term** shall mean the period between the official start date and agreed end date of the fellowship.
- 1.11 **Higher Education Institution (HEI)** For the purpose of these fellowships, a HEI in Ireland (as defined in clause 1.16) must be: within the meaning of Section One of the Higher Education Authority Act, 1971; and/or approved for the purposes of the Free Fees Initiative; and/or in receipt of some other form of public funding from the Department of Education and Skills. A list of eligible Irish HEIs is provided on [the Council's website](#)³.
- 1.12 **Home host organisation** shall mean the recognised HEI in Ireland or Research Performing Organisation (RPO, as defined in clause 1.24) which will

¹ http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/3cp/h2020-hi-list-ac_en.pdf

² This project has received funding from the European Union's Horizon 2020 research and innovation programme under the Marie Skłodowska-Curie grant agreement No 713279.

³ http://www.research.ie/sites/default/files/eligible_heis_rpos_in_ireland.pdf

- be employing the fellow for the entire duration of the fellowship and where the fellowship will be held.
- 1.13 **Host organisation** shall refer collectively to any home host organisation, any main partner organisation and any placement partner organisation.
 - 1.14 **Intergovernmental organisation (IGO)** shall mean an entity created by treaty, involving two or more sovereign states, or other IGOs, to work in good faith on issues of common interest.
 - 1.15 **International organisation (IO)** shall mean (i) any intergovernmental organisation or (ii) any non-governmental organisation with an international membership, scope or presence. European interest organisations are considered international organisations for the purpose of the scheme.
 - 1.16 **Ireland** shall for the purpose of the scheme mean the Republic of Ireland.
 - 1.17 **Main partner organisation** shall mean any non-governmental organisation or any international organisation as defined in clauses 1.18 and 1.15. A main partner organisation is permitted to support more than one fellow under each of the two types of CAROLINE fellowships, as long as it has the capacity and infrastructure required to support the relevant research work and to provide training to more than one fellow should more than one proposal be successful. In line with the aim of the scheme to support intersectoral mobility, education institutions are not eligible to act as main partner organisations even if they meet the definition of non-governmental organisation or international organisation.
 - 1.18 **Non-governmental organisation (NGO)** shall mean any non-governmental organisation, which is a legal entity, has an established governance structure (such as a board of directors), is independent of governmental control, and is working in support of the public good, not for profit. The NGO may be in receipt of public funds as long as it retains its independent status. Different terminology such as 'civic/civil society organisation' or 'not-for-profit' organisation can be used. NGOs can take various forms (national/international, charities, community groups, etc.) and can be located/working in any country.
 - 1.19 **Outgoing phase** shall mean the mandatory secondment of the fellow to their main partner organisation outside of Ireland in year 1 and 2 of the CAROLINE International fellowship (see 3.4.2). The outgoing phase is mandatory.
 - 1.20 **Placement** shall mean an optional temporary assignment of the fellow to the placement partner organisation as approved by the Council, to engage in the fellowship research and career and training development activities while embedded within the placement partner organisation. Placements are taken within the duration of the fellowship and do not constitute an extension. Placements are subject to mobility requirements as specified in Clause 4.5. The country correction coefficient to apply to the fellow's salary while on placement will be that of the country in which the fellow would be residing if the placement had not taken place.
 - 1.21 **Placement mentor** shall mean the person or persons employed by the placement partner organisation and designated by the placement partner organisation (see 1.22) as being responsible for supporting and mentoring the fellow in relation to the placement partner organisation's involvement in the fellowship.
 - 1.22 **Placement partner organisation** shall mean any NGO/IO or a for-profit organisation which enters into an agreement with the fellow and the fellow's home host organisation for an optional placement under the fellowship.

- 1.23 **Research Executive Agency (REA)** is a funding body created by the European Commission. REA manages a large share of Horizon 2020, including Marie Skłodowska-Curie Actions.
- 1.24 **Research performing organisation (RPO)** For the purposes of CAROLINE fellowships, an eligible RPO is one that possesses an existing in-house capacity to carry out research that materially extends and enhances the Irish research base and is in a position to demonstrate an independent capability to undertake and lead research projects/programmes, as approved by the Council. A list of eligible RPOs is provided on [the Council's website](#)⁴.
- 1.25 **Research project** shall mean the research work proposed by the fellow in their CAROLINE application and approved by the Irish Research Council.
- 1.26 **Return phase** shall mean year 3 of the CAROLINE International fellowship (see 3.4.2), during which the fellow is embedded with their home host organisation. The return phase is mandatory.
- 1.27 **Secondment** shall mean a mandatory temporary assignment of the fellow to the main partner organisation as approved by the Council, to engage in the fellowship research and career and training development activities while embedded within the main partner organisation. Secondment should be taken as a continuous period of time as specified for the relevant fellowship type and cannot be broken into several shorter secondment periods. Secondments are subject to mobility requirements as specified in Clause 4.5. The country correction coefficient of the country where the fellow will be located while on secondment will apply to the fellow's salary for the duration of secondment.
- 1.28 **Secondment mentor** shall mean the person or persons employed by the main partner organisation and designated by the main partner organisation as being responsible for supporting and mentoring the fellow in relation to the main partner organisation's involvement in the fellowship.
- 1.29 **Time of recruitment** shall mean the deadline by which the Inner International Assessment Board approves the final ranking list. For the 2018 CAROLINE call this date is 15th February 2018.

2. INTRODUCTION TO THE COUNCIL

- 2.1 The **mission of the Council is to enable and sustain a vibrant and creative research community in Ireland**⁵. The Council is an associated agency of the Department of Education and Skills and operates under the aegis of the Higher Education Authority. The core function of the Council is to support excellent research across all disciplines and career stages. The Council also has a particular role in supporting research with a societal focus, and has established partnerships across government and civic society.
- 2.2 The Council promotes diverse career opportunities for researchers by partnering with enterprise and non-academic sectors in general.

⁴ http://www.research.ie/sites/default/files/eligible_heis_rpos_in_ireland.pdf

⁵ <http://www.research.ie/aboutus/about-irc>

3. DESCRIPTION OF FELLOWSHIPS

3.1 The Council has been awarded funding by the European Commission under the Horizon 2020 Marie Skłodowska-Curie Actions to co-fund a research fellowship scheme with international, intersectoral and interdisciplinary mobility elements. The aims of the fellowships are to support suitable highly qualified experienced researchers in any discipline to:

- conduct research relevant to the overarching theme of global sustainable development as set out under the [United Nations 2030 Agenda](#) for shared economic prosperity, social development, and environmental protection⁶;
- engage in international collaboration with suitable NGOs or IOs;
- experience and benefit from international mobility;
- avail of relevant training and career development opportunities;
- increase their chances of gaining a future senior research position, including in the non-academic sector.

3.2 CAROLINE fellowships will be subject to the terms and conditions stipulated in the grant agreement in respect of the fellowships scheme signed by the Research Executive Agency, under the power delegated by the European Commission, and by the Higher Education Authority. The applicable [model grant agreement H2020-MSCA-COFUND-2015](#) is available for consultation on the European Commission's website⁷.

3.3 All fellowships must commence on 1 June 2018.

3.4 The Council offers two types of CAROLINE fellowships. Applicants may only apply for one fellowship.

Fellowship type	Duration	Location of fellowship
Irish fellowships	24 months	Home host organisation with a mandatory secondment to an NGO/IO in Ireland
International fellowships	36 months	NGO/IO outside of Ireland for years 1 & 2 and in home host organisation in year 3

3.4.1 Researchers awarded an **Irish fellowship** will be hosted by a home host institution in Ireland for two years, with a mandatory secondment of between six and twelve months' duration during this time to a main partner organisation located in Ireland with an optional placement to a placement partner organisation possible (up to three months). The main partner organisation can be legally established outside of Ireland provided that it

⁶ http://www.un.org/ga/search/view_doc.asp?symbol=A/RES/70/1&Lang=E

⁷ http://ec.europa.eu/research/participants/data/ref/h2020/mga/msca/h2020-mga-msca-cofund-mono_en.pdf

has physical presence (an office, research facilities etc.) in Ireland and can provide the necessary support to the researcher locally in Ireland.

3.4.2 Researchers awarded an **International fellowship** will spend the first two years seconded to their main partner organisation outside Ireland, with a mandatory one-year return phase at their home host organisation in Ireland, with the potential for optional placements to placement partner organisation(s). Placements can be up to six months in the outgoing phase and another six months in the return phase.

3.5 Placements should significantly add to the impact of the fellowship.

3.6 Awards under the CAROLINE fellowship scheme are made to the individual fellow; however, note Clause 5.1 and 6.2 below.

4. FELLOWS

4.1 Fellows will be selected for CAROLINE awards following a transparent, merit-based, impartial and equitable selection procedure, based on international peer review. Details of the process and evaluation criteria are provided in the Guide for Applicants.

4.2 Only complete applications submitted by eligible applicants and supported by eligible main partner organisations and, where applicable, by placement partner organisations, will be assessed.

Eligibility criteria

4.3 All CAROLINE applicants must fulfil the criteria for **one of the following two experienced researcher types**:

4.3.1 Experienced researcher type 1

4.3.1.1 has been awarded their doctoral degree within the **seven-year period before the time of recruitment**. Eligible career breaks of up to five years are taken into account⁸. For the purposes of this condition the date of graduation will be taken into account.

4.3.2 Experienced researcher type 2

4.3.2.1 does not hold a doctoral degree, but holds a master's degree or an undergraduate degree such as a bachelor's degree or equivalent⁹, enabling him/her to embark on a doctorate in Ireland or the country in which the qualification was obtained; and

⁸ Eligible career breaks include for example parental leave or carer's leave.

⁹ Degrees equivalent to the master's degree level 9 or to the honours bachelor degree level 8 on the Irish National Framework of Qualifications NFQ, see <http://www.nfq-qqi.com/index.html>

- 4.3.2.2 before the time of recruitment, has completed at least four years of full-time equivalent research experience following the qualification which would enable her/him to embark on a doctorate in Ireland or the country in which the qualification was obtained.
- 4.4 CAROLINE fellows must be able to communicate to the requisite standard through the English language. A statement confirming same by the home host institution will be required as part of the endorsement of the application.
- 4.5 Mobility requirements:
- 4.5.1 Applicants for the **Irish fellowship**:
- 4.5.1.1 Eligible applicants are those of any nationality or residency who have not been in Ireland for more than twelve months in the three years prior to the time of recruitment.
- 4.5.1.2 For refugees under the Geneva Convention, the duration of the refugee procedure will not be counted as a period of residence in Ireland.
- 4.5.2 Applicants for the **International fellowship**:
- 4.5.2.1 Eligible applicants are those who have not been in the country of the main partner organisation outside Ireland for more than twelve months in the three years prior to the time of recruitment.
- 4.5.2.2 For refugees under the Geneva Convention, the duration of the refugee procedure will not be counted as a period of residence in the country of the main partner organisation.
- 4.5.2.3 If the secondment is to be undertaken in a country other than an EU member state (MS) or an associated country (AC), the applicant must either be a national/resident citizen of an EU MS or AC, or have been continuously active in research for five years' full-time equivalent in a MS or AC, prior to the time of recruitment. If this condition is not met, the applicant will be deemed ineligible.
- 4.6 CAROLINE fellows must not currently hold or have held a Council INSPIRE¹⁰, CARA¹¹ or ELEVATE postdoctoral fellowship.
- 4.7 CAROLINE fellows must not be a permanent member of staff in a HEI/RPO in Ireland which would be their home host organisation for the fellowship.
- 4.8 CAROLINE fellows must not be a permanent member of staff in the proposed main partner organisation.

¹⁰ Awards made by IRCSET

¹¹ Awards made by IRCHSS

- 4.9 Fellows of any nationality may hold a CAROLINE fellowship. However, fellows must satisfy the home host organisation's and main partner organisation's country's regulations on immigration. CAROLINE fellows must have the support of their host institutions with respect to these regulations and requirements if not a national of a member state of the EU.
- 4.10 CAROLINE International fellows must maintain their principal residence outside Ireland in the country of the main partner organisation during their outgoing phase and in Ireland for the return phase of the fellowship. Where an optional placement in another country is proposed and approved by the Council, the fellow will be required to maintain their principal residence in the country of the approved placement partner organisation.
- 4.11 CAROLINE Irish fellows must maintain their principal residence in Ireland during the entire duration of their CAROLINE Irish fellowship. Where an optional placement outside of Ireland is proposed and approved by the Council, the fellow will be required to maintain their principal residence in the country of the approved placement partner organisation.
- 4.12 For all fellowships, arrangements with respect to immigration and the entitlement to work in Ireland will be a matter for settlement between the fellow and their host institution(s) and the relevant authorities of the State as applicable.
- 4.13 The Council reserves the right to request documentary evidence, as part of eligibility checking, after the call deadline. Where information provided by the applicant in their application form is found to be incorrect or cannot be verified if requested, the Council reserves the right to withdraw the award.
- 4.14 Acceptance of the award is subject to these Terms and Conditions and the Guide for Applicants which, in conjunction with the Letter of Offer and completed and signed Acceptance Form, constitute the basis on which the award is held.
- 4.15 Fellowships are held subject to these Terms and Conditions. If any of these are breached by a fellow, the Council will suspend or terminate the fellowship and/or may require reimbursement of such payments as have already been made to the fellow.
- 4.16 Fellows are required to adhere to the general principles and requirements of the ['European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers'](#)¹² as applicable to researchers.

¹² http://ec.europa.eu/euraxess/pdf/brochure_rights/am509774CEE_EN_E4.pdf

5. STRUCTURE AND VALUE OF FELLOWSHIP AWARDS

- 5.1 While the award is made to the individual fellow, the fellowship fund is administered through the appropriate office within the fellow's home host organisation.
- 5.2 The value of the CAROLINE fellowship will be calculated using the principles of the Marie Skłodowska-Curie Actions Individual Fellowships 2014–15¹³ and will consist of the following components¹⁴:
- 5.2.1 Payment to the home host organisation for the fellow's **living allowance**¹⁵. This amount will be determined using the base rate of €55,800 per annum, which will be adjusted by the applicable country correction coefficient as specified by the European Commission¹⁶ for each year of the fellowship, depending on the country of the fellow's residence in the given year¹⁷.
- 5.2.2 Payment to the home host organisation for the fellow's **mobility allowance** in the amount of €7,200 per annum, for years 1 and 2 of the CAROLINE fellowships.
- 5.2.3 Payment to the home host organisation for the fellow's **family allowance** in the amount of €6,000 per annum, where applicable¹⁸.
- 5.2.4 Payment to the home host organisation for the fellow's eligible **direct research, training and networking costs** to enable the fellow to carry out the fellowship, in the amount of €9,600 per annum. Eligible direct research, training and networking costs include essential research supplies such as small consumables; pay-as-you-go access to national research infrastructure; software and hardware critical for the research to be obtained in the first year of the award; archival research costs; books and journals; conference travel and participation; generic and/or specialist disciplinary skills training; and publishing and write-up costs. Only eligible vouched expenses necessary for implementation of the fellowship, incurred within the funding term and invoiced during the funding term will be funded. Membership costs, stipends for students, salary for research assistants or similar salary costs are not eligible direct research costs under the scheme.

¹³https://ec.europa.eu/research/participants/data/ref/h2020/wp/2014_2015/main/h2020-wp1415-msca_en.pdf

¹⁴ Note that the living allowance, mobility allowance and family allowance are subject to certain statutory deductions. Fellows are advised to liaise with their proposed home host organisation to ascertain the applicable deductions.

¹⁵ This payment includes the statutory employer's pension and PRSI contributions.

¹⁶https://ec.europa.eu/research/participants/data/ref/h2020/wp/2014_2015/main/h2020-wp1415-msca_en.pdf

¹⁷ With the exception of placements, see Clause 1.20

¹⁸ Family is defined as persons linked to the researcher by (i) marriage, or (ii) a relationship with equivalent status to a marriage recognised by the legislation of the country where this relationship was formalised; or (iii) dependent children who are actually being maintained by the fellow. Family status of a fellow will be determined at the deadline for applicants and will not be revised during the lifetime of the fellowship.

- 5.2.5 Contribution towards **indirect research costs** in the amount of €1,752 per annum to support the main partner organisation with costs associated with hosting the fellow, guiding, monitoring and documenting their training and development, and supporting good working conditions. For periods of time that the fellow spends with their home host institution, the contribution towards indirect research costs can be used, pro-rata, by the home host organisation, provided that the main partner organisation does not incur any fellowship-related indirect research costs during such periods of time.
- 5.2.6 Health insurance for CAROLINE fellows not eligible for the European Health Insurance Card (EHIC) or where fellows are outside of the scope of EHIC. Eligible fellows will liaise directly with the Council before the relevant arrangements are made.
- 5.2.7 Paid maternity leave in line with Irish policy and the Council's policy as outlined in Clause 10.
- 5.3 The maximum that can be spent in any year of a CAROLINE fellowship are the **relevant annual allowances as specified in the offer letter**, plus any unspent balance of eligible direct research support expenses carried over from the previous year of the fellowship if applicable. Apart from this, funds may not be carried forward from one year to the next.
- 5.4 Funding will be provided only for the implementation of the research project and the career training and development plan as presented in the application form. If any departures from this are intended or become apparent, the prior consent of the Council must be sought.
- 5.5 Expenses related to activities that occur outside the funding term are not eligible under the fellowship.

Taxation

- 5.6 The fellowship will be subject to Irish Revenue Law.
- 5.7 Compliance with Irish laws and national regulations on taxation will be a matter for resolution between the fellow, the home host organisation and the Irish Revenue Commissioners¹⁹.

6. CONDITIONS OF THE FELLOWSHIP

Location of fellowships

- 6.1 Fellows must be affiliated with an eligible Higher Education Institution in Ireland (as defined in 1.11) or an eligible Research Performing Organisation (as defined in Clause 1.24).

¹⁹ Some useful information on salary deductions and taxation can be found at http://www.citizensinformation.ie/en/employment/starting_work_and_changing_job/starting_work/

- 6.2 Fellowships may not be held or continued at any organisation other than the host organisations and with the mentors specified in the application form, except with the *prior* agreement of the Council.
- 6.3 During the fellowships, fellows must maintain an actual presence within the appropriate unit in their respective host organisation and must reside within a reasonable travelling distance of the relevant host organisation.
- 6.4 The Council requires that fellows have regular and sufficiently frequent contact with their academic mentor, secondment mentor and, where applicable, placement mentor.
- 6.5 Notwithstanding clauses 6.3 and 6.4, the Council recognises that the fellows may benefit from spending part of the duration of the fellowship away from their home host organisation, main partner organisation or, where applicable, placement organisation. Such periods may involve attending courses relevant to the fellow's training or research-related stays away.
- 6.6 In order to take up such an opportunity of more than four weeks' duration, the fellow must apply in advance to the Council for permission and include the written support of their academic mentor. When such research-related absence is intended during the mandatory secondment or optional placement, support from the fellow's secondment mentor or placement mentor, as applicable, will also be required. A template will be available for this purpose. Information regarding any fellowship-related trips must be documented as part of the required progress reporting.
- 6.7 While the Council expects fellows to complete their research at the home host organisation and main partner organisation originally proposed, the Council recognises that exceptional circumstances may call for a change of location or of a mentor. In these cases, the fellow and the proposed new mentor, home host organisation and main partner organisation must write to the Council stating the case for the change. The Council will examine the submission on its merits and respond with a decision on whether funding will continue in the new circumstances.

Training and Career Development Plan

- 6.8 The fellow, the academic mentor and the secondment mentor are required to create a Training and Career Development Plan as a method for developing a comprehensive work plan for the life of the fellowship and with a view to developing a dynamic career beyond the fellowship period.
- 6.9 A record must be kept of training and career development activities completed by the fellow and these must be reported in progress reports submitted to the Council.

Additional duties outside the remit of the fellowship

- 6.10 Fellows must be fully dedicated to the research training activities of their fellowship and should not engage in any remunerated activity other than developing the stated research project and implementing the Training and Career Development Plan.
- 6.11 Fellows must engage full-time in fellowship-related activities during the funding term.
- 6.12 Teaching is an essential means for the structuring and dissemination of knowledge and is considered a suitable activity under the fellowship. Engagement by the fellow in teaching activities is permitted where it is included in the Training and Career Development Plan, and under the following conditions:
- 6.12.1 teaching activities are undertaken while the fellow is based at their home host organisation; and
 - 6.12.2 the fellow's home host organisation is a HEI; and
 - 6.12.3 teaching activities are relevant to the research funded by the fellowship; and
 - 6.12.4 the overall extent of teaching activities (contact and non-contact hours combined) does not exceed a total of 50 hours per academic term; and
 - 6.12.5 suitable training, monitoring and support must be provided to the fellow by their academic mentor or another suitably qualified staff member within their HEI as agreed with the academic mentor.
- 6.13 The Council will monitor teaching activities as part of its progress reporting mechanism.
- 6.14 The Council may require the fellow to attend training sessions, research events, meetings and similar as arranged by the Council.

Additional awards

- 6.15 The fellowship is not intended to substitute for or to augment funds available under programmatic research actions. It may be held in conjunction with other externally funded travel or equipment grants provided that:
- 6.15.1 Should the fellow apply for further funding to another source, they will state as part of that application (whether or not the fellow is required to do so) that they hold a CAROLINE fellowship and will notify the Council prior to submitting the application.

- 6.15.2 The value of other funding is not more than €20,000 in any given year during the life of fellowship. However, the Council recognises that, from time to time, awards which exceed this limit may independently recognise the outstanding merit of an awardee during the term of the fellowship. In such circumstances, fellows are advised that in *exceptional cases*, and then only on a case-by-case basis, they may hold such major personal awards in conjunction with the funding provided by the Council. The acceptance of such further awards during the term of the fellowship is subject to the *prior* approval of the Council.
- 6.15.3 Fellows who have other sources of funding (other than through paid employment) such as travel grants, etc. must inform in writing the appropriate offices in their home host organisation and the Council about the amount and source of the funding. This information must also be recorded in the required progress reports. This applies to research funding received before or during the life of the fellowship.
- 6.15.4 The other funder(s) agrees that the CAROLINE fellowship can be held alongside their award. The Council will not involve itself in the decisions of other funding agencies in this regard.
- 6.16 Tax issues which may arise from such awards are a matter for the individual fellow and not the Council or the home host organisation.

Knowledge transfer

- 6.17 The Council encourages the commercialisation of research output as outlined in [‘Inspiring Partnership – the national IP Protocol 2016: Policies and resources to help industry make good use of public research in Ireland’](#)²⁰ and [‘Putting public research to work for Ireland: Policies and procedures to help industry make good use of Ireland’s public research institutions \(2012\)’](#)²¹.
- 6.18 The Council does not make any claim to intellectual property arising from the fellowship.
- 6.19 The host organisations must establish rules and procedures for protecting and managing any intellectual property arising during the fellowship as applicable, and set these in a written agreement (see Clause 11.4). These rules and procedures must be in accordance with the applicable national guidelines and Horizon 2020 requirements as stipulated in the [grant agreement governing the fellowships scheme](#)²².
- 6.20 Applications for protection of results including patent applications must include acknowledgement of funding under Marie Skłodowska-Curie Actions.

²⁰ <http://www.knowledgetransferireland.com/ManagingIP/KTI-Protocol-2016.pdf>

²¹ <https://www.enterprise-ireland.com/en/Research-Innovation/Companies/IPP-Putting-public-research-to-work-for-Ireland.pdf>

²² http://ec.europa.eu/research/participants/data/ref/h2020/mga/msca/h2020-mga-msca-cofund-mono_en.pdf

Dissemination of results and Open Access Policy

- 6.21 Unless it goes against the legitimate interests of the fellow and the host organisations, the fellow must – as soon as possible – disseminate results of their research by disclosing them to the public by appropriate means (other than those resulting from protecting or exploiting the results), including in scientific publications (in any medium).
- 6.22 A community outreach plan must be a part of the application and fellows will be required to report on implementation of the plan as part of the Council's progress reporting. Guidance on requirements on community outreach plan will be provided in the Guide for Applicants.
- 6.23 Open access to scientific publications will be governed by the rules relating to the placement of research publications and outputs in open access repositories as applicable under the [grant agreement governing the fellowships scheme](#)²³ and under the Council's [Open Access Policy](#)²⁴.
- 6.24 It is accepted that there will be recognised instances in which full compliance with Clause 6.25 might not be feasible – in this instance the fellow should contact their academic mentor for advice.
- 6.25 The fellows must ensure open access (free of charge online access for any user) to all peer-reviewed scientific publications relating to its results. In particular, they must:
- 6.25.1 as soon as possible and at the latest on publication, deposit a machine-readable electronic copy of the published version or final peer-reviewed manuscript accepted for publication in a repository for scientific publications;
 - 6.25.2 aim, moreover, to deposit at the same time the research data needed to validate the results presented in the deposited scientific publications;
 - 6.25.3 ensure open access – via the repository – to the deposited publication at the latest:
 - (i) on publication, if an electronic version is available for free via the publisher, or
 - (ii) within six months of publication (twelve months for publications in the social sciences and humanities) in any other case;
 - 6.25.4 ensure open access – via the repository – to the bibliographic metadata that identify the deposited publication.

²³ http://ec.europa.eu/research/participants/data/ref/h2020/mga/msca/h2020-mga-msca-cofund-mono_en.pdf

²⁴ http://www.research.ie/sites/default/files/irc_open_access_policy_final_1.pdf

6.26 Fellows are encouraged to adhere to H2020 Programme [Guidelines on Open Access to Scientific Publications and Research Data in Horizon 2020](#)²⁵.

Research ethics

6.27 The Council is not in a position to award funding for research activity under any of the following prohibited areas:

6.27.1 human cloning for reproductive purposes;

6.27.2 genetic modification of human beings that could make such changes heritable (with the exception of research relating to cancer treatment of the gonads, which may be funded);

6.27.3 creation of human embryos solely for the purpose of research or for the purpose of stem cell procurement, including by means of somatic cell nuclear transfer.

6.28 All CAROLINE fellowship-related activities must have exclusive focus on civil applications.

6.29 The Council is committed to the maintenance of high ethical standards in the research that it funds.

6.30 The host organisations must have in place clear ethical guidelines and assurance procedures designed to manage research under their direction.

6.31 The home host organisation is responsible for ethical approval/monitoring of the CAROLINE fellowship.

6.32 Fellows should adhere to the recognised ethical practices and fundamental ethical principles appropriate to their discipline(s) as well as to ethical standards as outlined in the applicable national, sectoral or institutional codes of ethics.

6.33 Fellows are required to give careful consideration to ethical issues which may arise in the course of their research.

6.34 If ethical issues arise in their research, fellows are required to submit a written statement to the Council to the effect that full consideration has been given to the ethical implications of the research proposal. This statement must also outline the fellow's proposed resolution of the ethical issue(s) arising.

6.35 Where a fellow's research proposal requires approval by the home host organisation's Ethics Committee, or the equivalent body in their home host organisation, written evidence of such ethical approval is required by the Council before activities for which ethical approval are required commence, but no later than three months after the start date of the fellowship.

²⁵ http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-pilot-guide_en.pdf

- 6.36 The host organisations and fellows must make sure that the research complies with all national and international regulation requirements governing the use of sensitive materials or processes, for example (and not intended to be a complete list): radioactive isotopes, ionising radiation, laboratory animals or other animals, pathogenic organisms, genetically manipulated organisms, toxic and hazardous substances, and research on human subjects and human embryos.
- 6.37 CAROLINE fellowships are also governed by the fundamental [ethical principles of Horizon 2020](#)²⁶. Horizon 2020 rules take precedence over national rules.
- 6.38 If access to archival material in private custodianship, or archival material with restricted access is required for the project, successful applicants will be required to provide written evidence of appropriate permission to consult such material as a part of award acceptance documentation.

Sex/gender dimension

- 6.39 The Council's '[Gender Strategy & Action Plan 2013–2020](#)' is available on the Council's website²⁷.
- 6.40 Fellows are required to give careful consideration to whether there is a potential biological sex and/or gender dimension that may arise in the course of their research.
- 6.41 Where the fellow is involved in the organisation of conference, networking or dissemination panels connected with their research project, due regard should be given to gender balance within any such panel(s).

7. RESEARCH INTEGRITY

- 7.1 All host organisations must ensure that the highest quality of research conduct is maintained.
- 7.2 The home host organisation must ensure that there are formal, fair and effective processes in place for the investigation of allegations of research misconduct (for example, plagiarism, falsification or fabrication of data, improper data selection, misuse of research funds) when they arise. These processes, together with the agreed procedures for investigating allegations of research misconduct, must be transparent and clearly publicised. The systems in place to manage research misconduct should also align with the basic principles that underpin all research integrity and good practice as outlined in the national policy statement '[Ensuring Research Integrity in Ireland](#)'²⁸ and in the '[European Code of Conduct for Research Integrity](#)' (revised edition 2017)²⁹.

²⁶ <https://ec.europa.eu/programmes/horizon2020/en/h2020-section/ethics>

²⁷ http://research.ie/sites/default/files/irish_research_council_gender_action_plan_2013_-2020.pdf

²⁸ <http://www.iaa.ie/research-innovation/research-integrity/>

²⁹ <http://www.allea.org/wp-content/uploads/2017/05/ALLEA-European-Code-of-Conduct-for-Research-Integrity-2017.pdf>

- 7.3 The home host organisation is required to report to the Council all findings of any proven case of research misconduct arising from a Council-funded research project.

Publications and acknowledgement of Council and European Commission funding

- 7.4 All proposed publications arising from the research work must have the approval of the academic mentor.
- 7.5 Advance notice of any such application must be provided to the secondment mentor, or an approval from the secondment mentor must be obtained in addition to that of the academic mentor, as per the agreement concluded between the home host organisation and the main partner organisation (as specified in Clause 11.4).
- 7.6 All publicity, including public lectures, interviews, email signatures, letterheads, office signs, publications, monographs, print materials, online materials, press releases, television and radio advertisements, websites, film, video and audio recordings associated with or arising from the research undertaken by the fellow while in receipt of a CAROLINE fellowship must contain acknowledgement of funding received from the Council and from the European Commission under the Marie Skłodowska-Curie Actions, as specified in the [fellowships scheme grant agreement](#)³⁰.
- 7.7 Notwithstanding the requirement to report on all publicity or achievements through progress reporting (see Section 10), fellows are also required to notify the Council in advance of their participation in any significant events, including receipt of an award or medal, public dissemination of the fellow's research, or media coverage of same. Where a communication activity is expected to have mainstream media coverage, the Council will inform the REA.

8. FINANCE

Payment of fellowship

- 8.1 Subject to the compliance of the fellow, mentors, and home host organisation and main partner organisation with these Terms and Conditions and subject to the receipt by the Council of satisfactory reports on the progress of the fellowship, the fellowship will be paid to the fellow's home host organisation, in quarterly instalments, beginning with the first instalment after the fellowship commences.
- 8.2 All amounts payable in respect of CAROLINE fellowships are made to the fellow's home host organisation. The Council does not transfer any monies directly to the fellow or to the main partner organisation.

³⁰ http://ec.europa.eu/research/participants/data/ref/h2020/mga/msca/h2020-mga-msca-cofund-mono_en.pdf

- 8.3 The home host organisation will coordinate payment of the award to the fellow. It is the responsibility of the fellow to contact the relevant research office (or equivalent) at the home host organisation with regard to the administration of the fellowship fund.
- 8.4 The fellow, in collaboration with their academic mentor and secondment mentor, is responsible for appropriate financial planning and spending under Clause 5.
- 8.5 Payment of a CAROLINE fellowship is wholly subject to the continued receipt of funding by the Council from the Department of Education and Skills, and the REA. In the event of such funding being reduced or discontinued, neither the Department of Education and Skills nor the Council will be under any liability to provide funding or to compensate a fellow for any reduction or cessation of such funding.

Financial accountability

- 8.6 The home host organisation is responsible for and accountable for the proper use of the fellowship fund for the entire duration of the fellowship.
- 8.7 The Council reserves the right to ask the external auditors of the home host organisation for confirmation that:
 - 8.7.1 the annual accounts of the home host organisation are up to date and have been approved by the auditors without qualification;
 - 8.7.2 the management letter from the auditors raised no matters that did or could significantly affect the administration of fellowships awarded by the Council;
 - 8.7.3 monies received under the fellowship have been used for the purpose for which they were awarded.
- 8.8 The Council reserves the right to commission audits of the participating home host organisation for financial or other compliance. The home host organisation undertakes to fully facilitate these reviews.
- 8.9 The Council accepts no responsibility, financial or otherwise, for expenditure or liabilities arising out of work carried out under the fellowship. The home host organisation must fully indemnify the Council against all such expenditure or liabilities and against any actions, proceedings, costs, damages, expenses claims and demands arising including, in particular, but without limitation, any claims for compensation for which the home host organisation may be liable as an employer or otherwise, or any claims by any person in relation to any intellectual property.
- 8.10 The home host organisation will return all unspent funds to the Council at the end of the funding term.

9. REVIEW OF PROGRESS

- 9.1 The Council attaches considerable importance to procedures for monitoring research performance and ensuring effective progress under the fellowship.
- 9.2 The fellow will be required to submit a comprehensive report annually, with a shorter report submitted midway through the year.
- 9.3 It will be the responsibility of the fellow to make sure that all progress reports are submitted on time. The timely submission of these reports is a condition of the continuation of the fellowship.
- 9.4 The format for these reports is available from the Council, and will include but will not be limited to:
 - 9.4.1 financial update
 - 9.4.2 implementation of the career development and training plan
 - 9.4.3 research progress and outputs
 - 9.4.4 outreach activities
- 9.5 These reports must be accompanied by a confidential evaluation of the progress of the fellowship from the academic mentor and the secondment mentor as applicable.
- 9.6 Reports will be requested by the Council and submitted by the fellow and their mentors through the online system.
- 9.7 Such reports, combined with other evidence of attainment, such as formal institutional approval, are a condition of continuation of funding.
- 9.8 If the fellow does not submit progress reports on time, or if the Council receives an unsatisfactory progress report or evaluation, the fellow will be informed of the unsatisfactory report. The fellow will be allowed to resubmit an amended report. The Council reserves the right to convene a review committee to evaluate the fellowship to date in accordance with the deliverables outlined in the original proposal to the Council (including the research plan, proposed outputs, and the career development and training plan).
- 9.9 If asked to do so, the fellow, academic mentor and secondment mentor must attend meetings with the Council to provide an account of the progress or outcomes of the fellowship.
- 9.10 If a review committee is convened by the Council, this committee can draw as necessary on disciplinary inputs from experts who have acted as evaluators. The Council will provide feedback to the fellow indicating either:
 - 9.10.1 report satisfactory in all respects and continuation of fellowship confirmed;

- 9.10.2 report deficient in some areas and specific actions for resolution indicated with a defined time period;
- 9.10.3 report indicates evidence of unsatisfactory progress and the fellowship may be suspended or terminated.
- 9.11 The Council may suspend or terminate the fellowship where it deems necessary following review of the foregoing information and reports.
- 9.12 All fellowships may be subject to an external research audit and financial audit.
- 9.13 It will be the responsibility of the fellow's academic mentor and secondment mentor to ensure that if the fellow leaves their host organisation, or is not dedicating sufficient time or effort to the fellowship, the Council is informed immediately.
- 9.14 The fellow must contact the appropriate office in their home host organisation if they have any concerns about their fellowship. Where such concerns are related to the main partner organisation's involvement in the fellowship, the fellow must initially address such concerns with their secondment mentor. Where such concerns are related to the placement partner organisation's involvement in the fellowship, the fellow must initially address such concerns with their placement mentor. If concerns continue, the fellow should contact the Council directly.
- 9.15 It is the responsibility of the fellow to inform the Council of any change of address, telephone, or email within two weeks of such a change. This should be done via the fellow's profile page on the online system. For ease of contact, fellows are requested to use a single email address for all correspondence from application to award and for the duration of the fellowship.
- 9.16 Fellows are required to provide follow-up contact details for the purpose of researcher career tracking in their final report or as otherwise requested by the Council. The Council will periodically carry out a destination survey of those who have received and completed fellowships, and the fellow shall agree to cooperate in responding thereto. Where a fellow's contact details change post-completion of their award, the fellow is asked to provide updated details via their profile page on the online system.
- 9.17 Fellows are required to complete and submit an evaluation questionnaire (at the end of the fellowship) and a follow-up questionnaire (two years later) provided by the Research Executive Agency.

10. DEFERRAL, SUSPENSION AND TERMINATION

Deferral or suspension of fellowship

- 10.1 Fellowships may not be deferred or suspended other than for eligible career breaks. Eligible career breaks include maternity leave, paternity leave, adoptive

leave, prolonged sick leave and carer's leave. Provision of documented evidence of an eligible career break will be required if a deferral or suspension is to be granted. A template form will be available for the purpose of requesting a deferral or suspension. The decision is at the discretion of the Council whose decision on the matter will be final.

10.2 Where there is an agreed suspension of the fellowship, the Council can consider fellows' requests for no-cost extensions beyond the funding term.

Maternity leave

10.3 CAROLINE fellows will be entitled to paid maternity leave as per Clause 5.2.7.

10.4 Fellows wishing to take maternity leave can request a suspension of their award for a period of up to one year. A template request form is available for the purpose of requesting approval from the Council. Once approved, the fellowship will be suspended for the relevant period of time and a new award end date will be calculated. The Council must be informed, in writing, of the expected commencement date of maternity leave at least four weeks in advance.

10.5 Fellows should contact their home host organisation regarding their intended maternity leave.

10.6 If the maternity leave is to take place during the fellow's mandatory secondment or placement, the fellow is required to liaise with their secondment mentor or placement mentor as applicable.

10.7 Fellows should contact the Department of Social Protection directly to ascertain whether they are entitled to maternity benefits.

10.8 The Council's [Maternity Leave Policy](#) is available on the Council's website³¹.

Termination of fellowship

10.9 The Council recognises that for personal, professional or other reasons a fellow may wish to terminate their fellowship prematurely. This action should not be taken without *prior* consultation with the Council.

10.10 Should a fellow be unable for any reason (including medical reasons) to pursue their fellowship in accordance with these Terms and Conditions and with the approved fellowship application, the fellow and academic mentor must, as soon as possible, inform the Council and the research office (or equivalent) in the home host organisation. Where an early termination is to occur before or during the fellow's mandatory secondment, the fellow must also liaise with their secondment mentor. Where an early termination is to occur before or during the fellow's placement, the fellow must also liaise with their placement mentor. The fellow must do this no later than two weeks of such a situation coming to their attention. In such situations, the Council will have regard to the usual

³¹

http://www.research.ie/sites/default/files/irish_research_council_maternity_leave_policy_final_2016.pdf

conventions of the fellow's home host organisation. However, given the basis on which fellowships are awarded, the Council reserves the right to withdraw or suspend the fellowship.

- 10.11 Where the fellow intends to prematurely terminate the fellowship, the Council will require evidence of progress in implementation of the fellowship to the date of departure.
- 10.12 In the event that the Council deems the fellow's progress inadequate, the Council may pursue the fellow, the home host organisation or both for reimbursement of the amounts expended.
- 10.13 If the fellow terminates a fellowship the Council is not responsible for continuing to pay funds to the home host organisation. The Council may seek to recover some or all the funds allocated or used.
- 10.14 The Council reserves the right to suspend or terminate the fellowship and/or require reimbursement by the home host organisation if in the opinion of the Council there has been a material breach of the Terms and Conditions as outlined in this document.

11. RESPONSIBILITIES OF HOST ORGANISATIONS

- 11.1 Employment and working conditions for the CAROLINE fellows must be aligned with Irish employment conditions and with the '[European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers](#)'³², including but not limited to working conditions, recognition of the profession and equal opportunities.
- 11.2 Host organisations must have the capacity to provide professional guidance and mentoring to the fellow and provide access to experimental facilities or data as relevant to the fellowship.
- 11.3 Host organisations are required to provide the facilities and access to the equipment needed for the fellow to carry out the research, ensuring that all items of equipment and materials provided for the fellowship are adequately maintained and are accessible on reasonable terms and conditions as apply to other researchers/staff members.
- 11.4 A written agreement covering confidentiality, publication, intellectual property rights, transfer of funding from the home host organisation to the main partner organisation, conditions of the fellow's secondment including the fellow's rights and responsibilities vis-à-vis the main partner organisation and other aspects of the fellowship as applicable must be in place between the home host organisation and the main partner organisation before the fellowship can commence. The terms of any such agreement must not conflict with those outlined in this document.

³² http://ec.europa.eu/euraxess/pdf/brochure_rights/am509774CEE_EN_E4.pdf

- 11.5 A copy of the written agreement between the home host organisation and the main partner organisation must be made available to the Council before the fellowship commences.
- 11.6 A written agreement as specified in Clause 11.4 in relation to optional placements should be in place where intellectual property is likely to arise from the fellowship. It is the matter for the home host organisation to determine whether such an agreement is needed to address other aspects of the fellow's placement depending on specific circumstances, such as duration of the placement, its location, etc.
- 11.7 Host organisations must obtain and comply with all necessary and statutory permissions laid down by local and national authorities in relation to protecting the environment, preventing pollution and ensuring wider societal health and safety protection.

Home host organisation

- 11.8 The home host organisation must accept full accountability for managing, monitoring and controlling all research work funded under the fellowship and management of the fellowship fund.
- 11.9 The home host organisation must ensure an academic mentor is appointed with responsibility for supporting and guiding the fellow. This academic mentor would normally be a principal investigator, or other suitably qualified person, and will be expected to be the home host organisation's staff member for the entire duration of the fellowship.
- 11.10 By providing institutional endorsement to a CAROLINE fellowship application, the home host organisation will confirm the eligibility and suitability of the proposed academic mentor to support the fellow.
- 11.11 The home host organisation must conclude an employment contract with the fellow for the entire duration of the fellowship. The contract will be the same contract the home host organisation offers for all fixed-term contracts, with the stipulation that the contract is held subject to continued funding from the Council. The employment contracts will contain information about the statutory working practices which determine the conditions for implementing the fellowship. It shall not conflict with rules governing the fellowship.
- 11.12 The employment contract must specify:
- 11.12.1 the law applicable to the employment contract;
 - 11.12.2 the nature of the appointment of the researcher in terms of status;
 - 11.12.3 the total duration of the fellowship, the start date and end date, and requirements relating to the mandatory secondment;

- 11.12.4 that the return phase under International fellowships must be started immediately following the outgoing phase;
- 11.12.5 the express guarantee that the employment contract in force with the home host organisation before the start of the outgoing phase will be maintained for the return phase; in combination with the obligation of the researcher to return to the home host organisation after the outgoing phase to carry out the return phase of the project;
- 11.12.6 details of the main partner organisation for the mandatory secondment, details of the location of work and of the name of the fellow's academic mentor;
- 11.12.7 the value of the fellowship and arrangements for payment to the fellow. Payments will be made in euro;
- 11.12.8 provisions for holidays and holiday pay, annual leave, sickness leave and maternity leave;
- 11.12.9 the arrangements between the home host organisation, main partner organisation and fellow relating to intellectual property rights (if applicable), as well as rules on confidentiality;
- 11.12.10 the social security coverage and the pension provided to the fellow.
- 11.13 The home host organisation is responsible for arranging appropriate accident insurance for the fellow for the entire duration of the fellowship.

Main partner organisation

- 11.14 The main partner organisation must ensure a secondment mentor is appointed to work with the fellow and their academic mentor, to offer advice and to create a link with the main partner organisation's research efforts.
- 11.15 Regular and sufficiently frequent contact should be maintained between the secondment mentor, the fellow and the academic mentor throughout the duration of the fellowship.

Placement partner organisation

- 11.16 The placement partner organisation must ensure a placement mentor is appointed to work with the fellow, their academic mentor and, where applicable, their secondment mentor, to offer advice and to create a link with the placement partner organisation's research efforts.
- 11.17 Regular and sufficiently frequent contact should be maintained between the placement mentor, the fellow, the academic mentor and, where applicable, the secondment mentor, throughout the duration of the placement as a minimum requirement.

12. GENERAL FELLOWSHIP CONDITIONS

- 12.1 These Terms and Conditions will be governed by and construed in accordance with the laws of Ireland and all parties will expressly and irrevocably submit to the jurisdiction of the Irish courts.
- 12.2 The Council will strive to adopt procedures that are consistent with the policies of the Irish Government in relation to the development of the information society and accordingly properly authenticated electronic communications will be treated as legally equivalent to paper submission.
- 12.3 The Council and host organisations must follow good practice on data protection, management and security. The Council cannot be held legally liable for interference by any third party.
- 12.4 It is a condition of acceptance of a fellowship that fellows grant permission to the Council to share data about the application with government departments and other national funding agencies for statistical and policy formation purposes.
- 12.5 The Council reserves the right to revise the Terms and Conditions of this fellowship at any time. Any such revisions will be notified to participating home host organisations and will also be posted [on the Council's website](#).

13. CONFLICTS OF INTERESTS

- 13.1 A conflict of interest is a situation in which an individual has competing interests or loyalties between his/her private interests and official responsibilities. Competing interests can make it difficult to fulfil one's duties impartially. The conflict can be real, apparent, or potential. A conflict of interest exists even if no unethical or improper act actually results from it.
- 13.2 Applicants and mentors should avoid situations whereby conflicts of interests would exist under the mentorship arrangements proposed for a fellowship. Where practicable, personal relationships such as spouses, partners, parent/child, siblings or similar should not exist between the applicant and the proposed academic, secondment or placement mentor.
- 13.3 It is recognised that in some cases potential conflicts of interest cannot be avoided, for example where a unique, highly specialised research expertise is required. Where a conflict of interests is unavoidable, including apparent and potential conflict of interests, the applicant and the concerned mentor (academic, secondment or placement mentor as relevant) are required to disclose the nature of the conflict of interests in their submission, and a second mentor (academic, secondment or placement mentor as relevant) will need to be nominated by the applicant.

13.4 Where the applicant and/or mentor fails to disclose a conflict of interests which will become apparent after the application deadline, the Council reserves the right to deem the application ineligible and withdraw the award.

14. DIGNITY IN THE CONDUCT OF RESEARCH

14.1 The Council supports a research system in which individual researchers are enabled to reach their full potential at all stages of their career. Fellows and their mentors are entitled to carry out their research free from any form of harassment, victimisation, or bullying. Host organisations have the responsibility to ensure an appropriate work environment and to deal with any complaints or issues speedily, in line with agreed grievance procedures. The Council's full statement on dignity in the conduct of research is available [on the Council's website](#)³³.

14.2 All Council staff are entitled to be treated with courtesy and respect at all times and, accordingly, are encouraged to report any instances of infractions to management. In cases where staff experience abusive or inappropriate behaviour, the Council reserves the right to report any such behaviour to the relevant personnel in the home host organisation or other organisation connected with the individual.

³³ http://www.research.ie/sites/default/files/statement_on_dignity_at_work_0.pdf