Funding Instrument: Equipment-related Travel and Training Grants

Functional Domain: GRANTS MANAGEMENT & SYSTEMS ADMINISTRATION

Document: Funding Guide

Date: October 2015
# LIST OF ABBREVIATIONS

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>CERN</td>
<td>European Organisation for Nuclear Research</td>
</tr>
<tr>
<td>CV</td>
<td>Curriculum Vitae</td>
</tr>
<tr>
<td>DA</td>
<td>Designated Authority</td>
</tr>
<tr>
<td>DHET</td>
<td>Department of Higher Education and Training</td>
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<tr>
<td>DST</td>
<td>Department of Science and Technology</td>
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<tr>
<td>ERTTG</td>
<td>Equipment-related Travel and Training Grants</td>
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<tr>
<td>ESRF</td>
<td>European Synchrotron Radiation Facilities</td>
</tr>
<tr>
<td>GMSA</td>
<td>Grant Management and Systems Administration</td>
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<tr>
<td>HDI</td>
<td>Historically Disadvantaged Institution</td>
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<tr>
<td>HICD</td>
<td>Human and Infrastructure Capacity Development</td>
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<td>ICGEB</td>
<td>International Centre for Genetic Engineering and Biology</td>
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<td>JINR</td>
<td>Joint Institute of Nuclear Research</td>
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<td>NEP</td>
<td>National Equipment Programme</td>
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<td>NFs</td>
<td>National Facilities</td>
</tr>
<tr>
<td>NNEP</td>
<td>National Nanotechnology Equipment Programme</td>
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<tr>
<td>NRF</td>
<td>National Research Foundation</td>
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<tr>
<td>RSA</td>
<td>Republic of South Africa</td>
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<tr>
<td>SADA</td>
<td>South African Data Archives</td>
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<tr>
<td>SALT</td>
<td>South African Large Telescope</td>
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</tbody>
</table>
Contact Details

The Grants Management and Systems Administration (GMSA) Directorate of the National Research Foundation (NRF) processes all grant applications and is responsible for the management and administration of grants. Full details of application procedures are explained in this document.

<table>
<thead>
<tr>
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<th>Ms Rebecca Molubi</th>
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</thead>
<tbody>
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</tr>
</tbody>
</table>

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E-mail Supportdesk@nrf.ac.za
1 Introduction

The Funding Guide provides a brief overview of the Equipment-related Travel and Training Grants (ERTTG) funding instrument, including issues of eligibility, exclusions, the application process, funding guidelines and review procedures. It does not, however, constitute a complete set of the policies, procedures or systems used by the NRF. It should be read in conjunction with the Strategic Framework, which is accessible at the following URL: http://nrfsubmission.nrf.ac.za.

2 Equipment-related Travel and Training Grants

2.1 Overview

The ERTTG Funding Instrument seeks to improve the competitiveness of South African research by advancing the national research agenda as defined in the National R&D Strategy\(^1\), the DST Ten-Year Innovation Plan\(^2\); and the strategic objectives of the NRF. Collectively, these seek to promote and support research through human resource development and facilitate access to state-of-the-art research equipment.

The NRF has, over the past several years, co-funded with the DST through a contractual agreement, both national and international travel costs in order to support researchers who require access to research equipment that is not available either regionally or nationally as well as the facilitation of workshops that focus on on-site training of instrumentation specialists, technicians, operators, researchers, postgraduate (masters and doctoral) students and other users.

2.2 Objectives

The ERTTG aim to support world-class research, enhance research collaboration nationally and internationally, and support the development of specialised skills required to sustainably manage and operate state-of-the-art research equipment.

The objectives of this funding instrument are to make funds available to support:


• The larger research community to access:
  o State-of-the-art equipment that is not available regionally and/or nationally;
  o Natural science collections such as those located at museums; and
  o Training workshops on the use of specialised equipment or feeder equipment that have been acquired through public funds and high-end equipment donated by the private sector;
• Researchers and postgraduate students in South Africa (SA) to access global research infrastructure located nationally (e.g. SALT) or abroad such as synchrotron radiation facilities;
• Researchers and postgraduate students in SA to access natural science collections for the completion of their dissertations;
• Research institutions hosting training workshops on the use of feeder and/or specialised equipment that is acquired either through NRF and/or DST funds; and
• Expert instrument scientists, that can aid NEP/NNEP grant-holder institutions to build capacity relating to the sustainable management of high-end equipment. Institutional co-investment is compulsory.

3 Scope
The rationale for this Funding Instrument is to make funds available to support the broader science community to access state-of-the-art research equipment that is not available at the home research institution, regionally or nationally. This will also include access to synchrotron facilities and other global research infrastructures. The grants are divided into two categories, namely:

• Equipment-related Travel Grants; and
• Equipment-related Training Grants.

The travel and training grants are aimed at:

• Full-time postgraduate (masters and doctoral) students that require training and/or access to infrastructure for the completion of their dissertations - supervisor must apply on behalf of the postgraduate student;
• Post-doctoral fellows - supervisor must apply on behalf of the post-doctoral fellow;
• Technicians, instrument specialist and operators that are full-time employees at a public research institution; and
• Researchers that are full-time employees at a public research institution.
3.1 **Equipment-related Travel Grants**

The objective of this part of the funding instrument is to provide financial support for researchers, technical staff and postgraduate (master and doctoral) students to access state-of-the-art research equipment within SA or abroad, that is not available at their own research institution, nor other institutions regionally or nationally. This part of the funding instrument is subdivided into two categories, namely:

### 3.1.1 General Equipment Travel Grants

These make funds available to researchers requiring access to specialised research equipment that is not available at their own institutions, regionally or nationally. The grant will cover national or international travel and subsistence costs as required.

### 3.1.2 Outbound or inbound travel grants to Access Global Infrastructure (AGI).

The two options for AGI are:

- **Outbound Global Infrastructure** located outside of SA such as the Joint Institute of Nuclear Research (JINR) in Dubna, Russia, the European Organisation for Nuclear Research (CERN) in Geneva, Switzerland and European Synchrotron Radiation Facilities (ESRF) in Grenoble, France. Currently research cooperation agreements between SA and JINR, CERN and ESRF respectively are in place. However, access to other synchrotron radiation facilities and global research infrastructure will also be considered for support.

- **Inbound Global Infrastructure** located in SA such as the South African Large Telescope (SALT), MeerKAT, the International Centre for Genetic Engineering and Biology (ICGEB) and the National Facilities (NFs).

3.2 **Equipment-related Training Grants**

This intervention makes funds available for:

- **Researchers** to host or attend workshops focussed on training technical staff, postgraduate students and other users of:
  - Specialised or state-of-the-art research equipment; or
  - Feeder equipment that complements the capabilities of state-of-the-art research equipment.

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3 The initial training that forms part of the commissioning of new equipment will not be covered by this training grant as this may be factored into the purchase price of the equipment.
Such equipment must have been acquired either through NRF and/or DST grant awards. This type of intervention may include practical training and short courses on the use of such research equipment; and

- **Institutions** that have been awarded NEP/NNEP grants, and require skills training from expert instrument scientists on the sustainable management of the research equipment. These institutions may apply for funding to host a visiting instrument scientist. The instrument scientist may be hosted by the applying research institution for a minimum period of one (1) month to a maximum period of six (6) months due to his/her scarce skill in the use of a specific instrument that has been acquired through NRF and/or DST funds. The institution hosting the visiting instrument scientist, must be committed to a compulsory matching co-investment with the DST-NRF on a 1:1 ratio.

4 **Application Process**

4.1 **Eligibility criteria**
All applicants must be **full-time staff members** at a South African public research institution, including universities, Science Councils, NFs, museums or public corporations such as NECSA. In addition, the following funding instrument-specific criteria apply:

**Travel Grants:**
- Full-time postgraduate (masters and doctoral) students that require training and/or access to infrastructure for the completion of their dissertations - *supervisor must apply on behalf of the postgraduate student*;
- Post-doctoral fellows - *supervisor must apply on behalf of the post-doctoral fellow*;
- Technicians, instrument specialist and operators that are full-time employees at a public research institution; and
- Researchers that are full-time employees at a public research institution.

**Training Grants:**
Support is available for the following:
- Researchers hosting training programmes on the use of high-end equipment. This training programme must have regional and/or national benefit.
- Hosting of an expert instrument scientist that is required to stay at a research institution for a minimum period of one (1) month to a maximum period of six (6)
months due to his/her scarce skill in the use of a specific instrument that has been acquired through NRF and/or DST funds. The institution hosting the visiting instrument scientist, must be committed to a compulsory matching co-investment with the DST-NRF on a 1:1 ratio.

4.2 Exclusion criteria

Undergraduate and Honours students are not eligible to apply for ERTTG. In addition, the following funding instrument-specific exclusions are applicable:

**Travel Grants:**
Requests for funding to support:
- Research that advances private enterprise;
- Outbound visiting scientists;
- Attendance of conferences and/or training workshops; and
- Testing the functional capability of equipment that an applicant may procure through NEP and/or NNEP grants. The applicant, in partnership with the supplier, must achieve this.

**Training Grants:**
Requests for funding to support:
- Training that addresses the applicant’s institutional needs only; and
- Basic training of operators and technicians, provided by the supplier as part of equipment acquisition (if training is needed over and above the initial training with the supplier, a strong motivation is needed).
4.3 Application requirements

The submitted proposal must address the following:

<table>
<thead>
<tr>
<th>General Equipment Travel Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>• There must be a clear indication that the research equipment the applicant proposes to access is not available in the applicant’s own institution, nor at other institutions regionally or nationally. This may include letters from other institutions explaining that similar equipment will not be able to support the research activities of the applicant;</td>
</tr>
<tr>
<td>• Applications for students must be submitted by the supervisor who will be accountable for the Conditions of Grant awarded;</td>
</tr>
<tr>
<td>• Applications must be supported by the Designated Authority (DA) at the research institution;</td>
</tr>
<tr>
<td>• Travel grants to support access to research equipment nationally may not exceed R30 000 (thirty thousand rand) per individual applicant unless strongly motivated for by both the applicant and the DA at the research institution; and</td>
</tr>
<tr>
<td>• An applicant may travel with one co-applicant (preferably a postgraduate student) to a maximum of two (2) co-applicants. The applicant will be awarded an additional R10 000 (ten thousand rand) per co-applicant and the maximum budget will be R50 000* (fifty thousand rand) when travelling with two co-applicants i.e. a maximum of three individuals travelling at the same time (NB: This number is inclusive of the applicant).</td>
</tr>
<tr>
<td>• International travel grant maximum per individual applicant may not exceed R50 000 (fifty thousand rand) unless strongly motivated for by both the applicant and the DA at the research institution. An applicant is allowed to travel with a maximum of two co-applicants (preferably postgraduate students) at a maximum budget of R100 000. An applicant travelling with two applicants will be awarded an additional amount of R30 000 for the first co-applicant, and R20 000 for the second co-applicant respectively. The maximum budget will be R100 000 (one hundred thousand rand) when travelling with two applicants i.e. a maximum of three</td>
</tr>
</tbody>
</table>
individuals travelling at the same time (NB: This number is inclusive of the applicant).

Where the cost of the trip exceeds R50 000 (fifty thousand rand) for a national trip and R100 000 (one hundred thousand rand) for an international trip, the applicant must clearly demonstrate that co-applicants will accompany the applicant and that additional funding has been secured to cover the full cost of travel.

*see budget guidelines in 4.3.1 hereunder

<table>
<thead>
<tr>
<th>Synchrotron Travel Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>A strongly motivated proposal that includes supporting documentation such as invitations, training and an access schedule from the synchrotron radiation facility that the applicant proposes to visit;</td>
</tr>
<tr>
<td>Applications for students must be submitted by the supervisor who will be accountable for the <em>Conditions of Grant</em> awarded;</td>
</tr>
<tr>
<td>Applications must be supported by the DA at the research institution; and</td>
</tr>
<tr>
<td>• The maximum request per individual applicant may not exceed R50 000 (fifty thousand rand) unless strongly motivated for by <em>both the applicant and DA</em> at the research institution. An applicant is allowed to travel with a maximum of two co-applicants (preferably postgraduate students) at a maximum budget of R100 000. An applicant travelling with two applicants will be awarded an additional amount of R30 000 for the first co-applicant, and R20 000 for the second co-applicant respectively. The maximum budget will be R100 000 (one hundred thousand rand) when travelling with two applicants i.e. a maximum of three individuals travelling at the same time (NB: This number is inclusive of the applicant).</td>
</tr>
<tr>
<td>Where the cost associated with an international synchrotron radiation facility visit of two weeks exceeds R100 000* (one hundred thousand rand), the applicant must clearly demonstrate that co-applicants will accompany the applicant and that additional funding has been secured to cover the full cost of travel.</td>
</tr>
<tr>
<td>*see budget guidelines in 4.3.1.</td>
</tr>
</tbody>
</table>
### Training Grants

- Adequate justification must be provided for the need for the training, which must have either regional and/or national impact;
- The proposed training programme must include the training of researchers based at historically disadvantaged institutions (HDIs), black and female researchers/technicians as well as postgraduate students;
- Where the cost of *hosting* the training/workshop exceeds R65 000 (sixty five thousand rand), the applicant must clearly demonstrate that additional funding has been secured to cover the full cost;
- Where the cost of *attending* the training/workshop exceeds R30 000 (thirty thousand rand) for a national trip and R50 000 (fifty thousand rand) for an international trip, the applicant must clearly demonstrate that additional funding has been secured to cover the full cost;
- Applicants are encouraged to engage with suppliers for such training workshops;
- Where a visiting instrument scientist is required to stay at a research institution for a minimum period of one (1) month to a maximum of six (6) months due to his/her scarce skill in the use of a specific instrument that has been acquired through NRF and/or DST funds, the institution hosting the visiting instrument scientist, must be committed to a compulsory matching co-investment with the DST-NRF on a 1:1 ratio. A commitment letter from the institution must be attached to the application.

1 – 3 months stay: R60 000 (Maximum NRF contribution)
3 – 6 months stay: R120 000 (Maximum NRF contribution).
4.3.1 *Budget Guidelines: Maximum NRF Investment per Activity

<table>
<thead>
<tr>
<th>NATURE OF THE ACTIVITY</th>
<th>Maximum National Travel/Training Support</th>
<th>Maximum International Travel/Training Support/ Synchrotron/ other Global Infrastructure</th>
<th>Maximum to host a workshop</th>
<th>Visits by Instrument Scientists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant</td>
<td>30 000</td>
<td>50 000</td>
<td>65 000</td>
<td>N/A</td>
</tr>
<tr>
<td>Applicant plus one Co-applicant</td>
<td>40 000</td>
<td>80 000</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Applicant plus two Co-applicants</td>
<td>R50 000</td>
<td>100 000</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>1 – 3 months stay</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>60 000</td>
</tr>
<tr>
<td>1 – 6 months stay</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>120 000</td>
</tr>
</tbody>
</table>

Retrospective funding that spans a period of *six* months can be considered in this funding instrument.
4.4 Application Process

The NRF issues a Call for Proposals for ERTTG Funding Instrument, which is placed on the NRF website, is disseminated to the Research Offices of the various institutions, and the application is accessible online at https://nrfsubmission.nrf.ac.za. All applications must be duly authorised and approved by the DA of the research administration at the institution that submits the application.

The Call for Proposals will be open from

Monday, 10 November 2015 to Thursday, 10 December 2015.

No late applications will be considered.

Applications submitted may be for a single researcher and/or on behalf of one or two postgraduate student/s.

Applications, where applicants fail to complete/update the NRF Online Curriculum Vitae (CV) sections, will not be considered for funding.

All applicants must submit the following:
- A completed NRF online application form that has been endorsed by the DA at the research institution;
- A confirmation letter, from the institution to be visited, of allocated time on the research equipment; and
- A detailed budget indicating how additional funds have been secured.
The following additional information is required for Synchrotron Travel Grants, Equipment-related Training Grants and Visiting Instrument Scientists:

<table>
<thead>
<tr>
<th>General/ Synchrotron Travel Grants</th>
<th>Equipment-related Training Grants</th>
<th>Visiting Instrument Scientist</th>
</tr>
</thead>
</table>
| • A confirmation of the outcome of the peer review process and allocated beam time from the host synchrotron facility/ Confirmation that you have been allocated time to access the equipment; | • Detailed programme/training schedule for the training session;  
  • Costing plan: food, venue, speakers (flights and accommodation), etc;  
  • A letter of confirmation indicating that a trainer has been appointed by the supplier/manufacturer for a specific date, time and venue;  
  • A Curriculum Vitae of the trainer/visiting instrument scientist; and  
  • It is recommended that the NRF representatives be invited to these training sessions. | • Letter of invitation from a South African public research institution, which has been awarded a NRF/DST equipment grant.  
  • Quotation/proof of flights, accommodation, subsistence and travel allowance of the visiting instrument scientist  
  • Letter from DvC motivating the need to host a visiting instrument scientist, as well as indicating a 1:1 (NRF: institution) commitment towards the cost of hosting the visiting instrument scientist for a specified time.  
  • The CV of the visiting instrument scientist. |
| • Copy of Quotation/proof of flights, accommodation, subsistence and travel allowance; | | |
| • Letter of invitation from the research infrastructure facility; and | | |
| • Proof of registration for the training workshop that the applicant wishes to attend. | | |

4.5 Institutional Responsibility

The institutional DA must:

• Ensure that the online applications are completed in full with all the necessary supporting documentation attached;

• Ensure compliance to the requirements of the Call for Proposals as advertised in the Funding Instrument Framework and this Guide;

• Validate and authorise all applications submitted on the NRF Online Submission System; and

• Submit a letter to the NRF confirming the date of commencement of the activity applied for within one month, from the date of commencement.
5 Evaluation process

5.1 Overview of the Screening Process
All applications validated by institutions and submitted to the NRF are screened by GMSA for compliance with the requirements of the Call for Proposals, the stipulations set out in this Funding Guide, and the system requirements indicated in the online application screens. Applications that fail to meet the requirements and stipulations are rejected.

5.2 Overview of the Panel Peer Review
All applications submitted are subjected to a Peer Review Panel. Panel members are selected from the NRF database, which is updated on a continuous basis, as well as other sources. In making the selection, the expertise and experience of individuals in application adjudication are taken into account. In assessing the proposals, agreed assessment criteria are applied in the form of a scorecard.

The Peer Review Panel provides recommendations to the NRF on all proposals. The final funding decision is made by the NRF. In awarding grants in this Funding Instrument, the NRF takes into account these recommendations, the budget motivations by the applicant, as well as the availability of funds within the Funding Instrument.

The following score card will be used to evaluate all applications for ERTTG grants.
## ERTTG Score Card

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Details</th>
<th>Weight</th>
<th>Poor</th>
<th>Unsatisfactory</th>
<th>Satisfactory</th>
<th>Good</th>
<th>Very Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scientific Motivation</td>
<td>Scientific motivation of proposed:</td>
<td>50%</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>• Travel request; or</td>
<td></td>
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<tr>
<td></td>
<td>• Training attendance; or</td>
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<td></td>
<td>• Hosting of training/ workshop; or</td>
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<td></td>
<td>• Hosting visiting instrument scientist.</td>
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<tr>
<td>Potential Impact</td>
<td>Proposed impact on:</td>
<td>10%</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
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<tr>
<td></td>
<td>• Socio-economic challenges facing South Africa; and/or</td>
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<td></td>
<td>• National priorities; and/or</td>
<td></td>
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<tr>
<td></td>
<td>• Other.</td>
<td></td>
<td></td>
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<tr>
<td>Expected Outputs</td>
<td>Expected Outputs:</td>
<td>20%</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
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<tr>
<td></td>
<td>• Completion of a dissertation; and/or</td>
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<td></td>
<td>• Human capital development (staff or postgraduate training); and/or</td>
<td></td>
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<td></td>
<td>• Publications; and/or</td>
<td></td>
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<tr>
<td></td>
<td>• Other outputs.</td>
<td></td>
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</tr>
<tr>
<td>Financials</td>
<td>Feasibility of proposed budget</td>
<td>20%</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

### Descriptor General guiding notes

#### Poor

The proposal provided insufficient information regarding the requirements of the funding instrument\(^4\), and/or has numerous inconsistencies for a fair evaluation to be conducted.

#### Unsatisfactory

The proposal only partially addresses the requirements of the funding instrument and has significant issues that should be addressed by the applicant.

#### Satisfactory/ Adequate/ Fair

The proposal meets all minimum/ necessary requirements of the funding instrument.

#### Good

This is a strong proposal that fully addresses the entire requirements of the funding instrument.

#### Very Good

This is an exceptionally strong proposal that is well thought through and strongly motivated, as well as exceeds all the requirements of the funding instrument.

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\(^4\) Funding instrument requirement refers to: Scientific motivation, potential impact, expected outputs and feasibility of the proposed budget.
6 Grants Administration

- Grants are paid to the organisation where the grantholder is employed.
- The grants awarded are to be used for the purpose stated in the application and according to the NRF and institutional financial policies.
- The release of NRF funds for payment will be made according to the normal granting rules used by the NRF, that is, 90% of the grant will be released upon receipt of the following documentation:
  - The signed CoG; and
  - A letter by the DA confirming the start date of the activity.
- The balance of the grant (10%) will be released for payment upon receipt of a satisfactory completion report as outlined in section 7.1 of this document.

7 Grantholder Responsibilities

7.1 Reporting

All grantees are required to submit a completion report to the NRF no later than 30 (thirty) days after the activity applied for has been completed. The completion report template has to be completed electronically and will be available on the NRF online system at http://nrfsubmission.nrf.ac.za. The report should be scrutinised and validated by the relevant DA.

The following types of outputs are expected to emanate from the activities and should be reported stating the:

- Scarce skills development on the use of specialised equipment and analytical systems;
- Training of black and female researchers, as well as researchers from historically disadvantaged institutions; and
- Research outputs:
  - Publications;
  - Conference Proceedings;
  - Collaborations;
  - Improved laboratory processes; and
  - Other (explain).

Successful applicants who do not submit post-travel/training reports within one month after completion of the activity will not be considered for further funding in this Funding Instrument.
8 General

8.1 Intellectual Property Rights
The intellectual capital generated by NRF funded research must be appropriately protected and exploited for the benefit of South Africa. This condition should not interfere with the Intellectual Property Rights arrangements already made on condition that the majority of the benefits arising from the intellectual capital accrue to South Africa and its citizens. This condition is aligned with the Intellectual Property Rights Act\(^5\) which will override this condition of grant.

8.2 Ethics
The grantholder is required to maintain the highest ethical and safety standards in conducting the research, particularly when human and animal subjects are involved. It remains the responsibility of the project leader to comply with all relevant regulations in this regard, including those of the institution at which the research is carried out. An ethical clearance certificate (where applicable) must be submitted to the NRF in respect of successful applications before funding can be released.

8.3 Access to data
The data generated from the proposed research must become available to other researchers working in the same field. Therefore, it is important that the data is provided to domain specific databases or in their absence, to the South African Data Archive (SADA).

8.4 Data Storage, Usage and Dissemination
In the event the outputs of the research project not being protected, conscious plans need to be made to make the data available to the larger research community through existing databases, some of which can be specific to the research field and others to generic research fields. Furthermore, measures need to be undertaken to ensure effective data management and integrity.

8.5 Change of Applicant to travel or train
In the event of the Grantholder leaving the Institution for whatever reason, or is unable to undertake the activities as stipulated in the proposal, the NRF must be informed (where possible, prior to the departure of the grantholder from the institution) and the funds be returned to the NRF. No transference of the grant is allowed within this Funding Instrument.