

# 2018 Key Action 1 (KA1) Higher Education Handbook

For UK Higher Education Institutions and Consortia  
Managing Higher Education Mobility Projects  
KA107 (International Credit Mobility)

Version 2: 29 April 2019

This handbook is a guidance document for the management of Key Action 107 International Credit Mobility (ICM) projects. This handbook is designed to provide information to support your Grant Agreement, including all associated annexes and the [2018 Programme guide](#). Your Grant Agreement and the 2018 Programme Guide are the primary documents you should refer to and need to comply with.

Should any information in this handbook differ from either the Grant Agreement or the 2018 Programme Guide, the content of the Grant Agreement, its annexes and the Programme Guide will take precedence. If you have any queries about the content of this Handbook please contact [erasmus@britishcouncil.org](mailto:erasmus@britishcouncil.org)

## Overview of changes to the handbook

This is **version 2** of the 2018 Key Action 107 Operational Handbook. If future versions of this document are created, the table below will record an overview of changes made compared to previous versions:

Page number in previous version	Change	Page number in this version
10	Updated information regarding interruption days	10

## Contents

1.1.	General.....	4
1.2.	Eligibility and ECHE Compliance .....	4
1.3.	New Coordinators.....	5
1.4.	Change of Legal Representative .....	5
1.5.	Inter-Institutional Agreements .....	6
1.6.	Period of Activity.....	7
1.7.	Additional Support for Students and Staff.....	7
1.8.	Zero Grant Participants .....	8
1.9.	Dissemination .....	8
1.10.	Record keeping .....	8
1.11.	Selection Procedures .....	8
1.12.	Signatures .....	9
1.13.	Agreements with Individuals .....	9
1.14.	EU Survey (Participant report) .....	10

1.15.	Incoming Erasmus+ Mobility .....	10
1.16.	Early Returners, Short Durations and Interruptions of Mobility Periods .....	10
1.17.	Setting of Grant Rates .....	11
1.18.	Allocation of Funds .....	11
1.19.	Reporting Deadlines .....	11
1.20.	Interim Report.....	11
1.21.	Final Report .....	12
1.22.	Monitoring Special Needs on Mobility Tool+ .....	12
1.23.	Payment conditions .....	12
1.24.	Bank accounts and currency .....	12
2.	Grant awards .....	13
2.1.	Grant Agreements and Annexes.....	13
2.2.	Grant Management .....	14
3.	Making changes to your project .....	14
3.1.	Budget Transfers .....	14
4.	Student Mobility .....	15
5.	Student Study Mobility .....	17
6.	Student Traineeship Mobility.....	19
6.4.	Student Grant Rates.....	20
6.5.	Student Mobility –Combined .....	20
7.	Staff Mobility - teaching .....	21
7.3.	Staff Mobility - Combined .....	21
7.4.	Staff Mobility Grants .....	22
8.	Staff Mobility – training .....	23
8.1.	Staff Training Programme .....	24
9.	Organisational Support (OS).....	24
10.	National Agency Monitoring Activities.....	25
10.1.	Documentary Evidence .....	25
10.2.	Feedback from Audit Visits Carried Out by the NA .....	25
10.3.	Repayment of Grant Monies .....	25
10.4.	Practicalities for Audit Visits Carried Out by the NA .....	26
11.	Useful Links .....	26

## Information for Key Action 1: Mobility of Individuals within Higher Education

### 1.1. General

Key Action 1 supports mobility in the education, training and youth sectors and aims to bring long lasting benefits to the participants and the organisations involved. This Action provides opportunities for individuals to improve their skills; enhance their employability and gain cultural awareness.

For more information about Erasmus+ and Key Action 1, please refer to the following sections of the [2018 Programme Guide](#)

General Information about the Erasmus+ Programme	.....	Pages 5 - 23
Specific rules relating to KA1 Higher Education Projects	.....	Pages 264 - 270
Dissemination - A practical guide for beneficiaries	.....	Pages 307 - 312
Useful References and Contact Details	.....	Pages 322 – 324

### 1.2. Eligibility and ECHE Compliance

The [ECHE annotated guidelines](#) outline the requirements the HEI must fulfil in order to comply with the Charter principles. Please also refer to the ECHE Monitoring guide for more information. HEIs must respect all the provisions of the ECHE during the implementation of the project.

Compliance of the HEI with the ECHE principles is monitored by the National Agency through a variety of measures. HEIs must respect all the provisions of the ECHE during the implementation of the project. **Violation of any of the ECHE principles and commitments may lead to its withdrawal by the European Commission. You can find the recently published UK NA Compliance report which highlight areas of best practice [here](#)**

#### Changes to the ECHE Policy statement

HEIs are free to update their Erasmus Policy Statement (EPS) at any stage during the project life cycle in order to reflect their latest strategy. To change your EPS, HEI's are required to amend the EPS on their website and notify the NA to ensure accuracy and compliance of the ECHE.

### **Consortium Changes**

If you wish to add a new partner to an existing consortium, the amendment needs to be approved by the UK NA. The NA will assess the implications of the change to the consortium and check that all eligibility criteria have been fulfilled and there is no impact on the overall scope and quality of the consortium.

### **Mergers and Splits**

If an HEI holding an ECHE, or any member of an accredited consortium, is involved in a merger or split, or if their name changes, they should inform the UK NA as soon as details are known, specifying the type of merger, split or new name. A new ECHE may be needed for a new institution.

Information about how to update your organisation's ECHE in the event of a merger/split can be found on the European Commission's (EC) ECHE page [here](#).

### **Overseas Campuses or Franchises**

If the campus located in a Partner Country is not an independent institution but dependent on the parent institution, such as a UK University, and covered by its ECHE accreditation, the students in the Partner Country can participate in mobility projects as students of the UK university. However, they cannot carry out the mobility activities in the country of the sending institution (UK) or in the country where they have their accommodation during studies.

If the campus located in a Partner Country is an independent institution, then the students and staff can take part in Erasmus+ from that institution, providing funding has been agreed.

### **Eligibility of Partner Country HEIs**

Partner Country HEIs are not required to hold the ECHE as it only applies to Programme Country HEIs. See section 1.5 Inter-Institutional Agreement for more information.

## **1.3. New Coordinators**

If the coordinator changes during the Erasmus+ project, you need to complete and email the [Project Contact Form](#) to the National Agency (NA) as soon as you are aware of a change.

## **1.4. Change of Legal Representative**

If your Legal Representative changes during the Erasmus+ project, you must complete the [Change of Data form](#) and email it to the UK NA. You must also attach letter of appointment from your HR department to confirm the new signatory has the authority to sign legal

documents on behalf of the institution. You must then send the same documents to the ECHE team at the EC: [EACEA-ECHE@ec.europa.eu](mailto:EACEA-ECHE@ec.europa.eu).

## 1.5. Inter-Institutional Agreements

### Mobility between Programme and Partner Countries

Student Study and staff mobility for teaching or training must be covered by an international inter-institutional agreement. The inter-institutional agreement must be signed **before mobilities begin**. The international version of the Inter-Institutional Agreement incorporates aspects of the ECHE into the agreement.

The template for the Inter-institutional agreement is available to download on the Erasmus+ website under the 'Agreements' section. The original text cannot be altered, although extra clauses may be added.

### Multiple Institutions in the same Partner Country

If the mobility flows are organised between a UK institution and several institutions located in the same Partner Country, the parties involved are free to sign a 'bilateral' Inter-Institutional Agreement with each individual partner, or a 'multilateral' Inter-Institutional Agreement with all partners, providing all the minimum requirements set out in the Inter-Institutional Agreement are fulfilled.

### Finding Partner HEIs

The UK NA has a webpage specifically for UK HEIs wishing to find partners for KA107 projects. Institutions in Partner countries complete the Partner Search form which is published on our ['Higher Education partner opportunities' page](#). UK organisations can then contact the organisation in the Partner country to discuss working together under Erasmus+.

### ISCED 2013 Codes

For any subject area within Erasmus+, ISCED 2013 codes must be used. The ISCED codes were reclassified in 2013 and provide subject areas for broad, narrow and detailed fields. For further information, please see the [UNESCO ISCED 2013 manual](#) and the [EC ISCED code finder tool](#).

### Not further defined and not elsewhere classified

If there is no further information about the subject area then it can be classed as '*not further defined*' and one or more '0' is added to the end of the code. For example a programme in Engineering should be classified as 0710 Engineering and engineering trade.

If the subject information is provided, but a suitable ISCED code is not provided, then it can be classed as 'not elsewhere classified' and a '9' are to be added to the end of the code. For example a new subject within ICT should be classified as 0619 'ICT not elsewhere classified'.

## 1.6. Period of Activity

The project duration is either 16 or 26 months as specified in the Grant Agreement. All mobility periods must be completed by the project end date as specified in section I.2.2 of the grant agreement.

For 16 month projects, the grant is awarded for mobilities taking place from 1 June 2018 to 30 September 2019.

For 26 month projects, the grant is awarded for mobilities taking place between 1 June 2018 and 31 July 2020.

Mobilities which take place across two Grant Agreement periods should be reported as two separate mobilities.

### 26 Month Projects

The EC has confirmed the purpose of 26 month projects is to provide flexibility at the end of the project. The project funding should ideally be allocated to participants within the first year, but funding can be spent throughout the entire project duration. This is to allow the NA to successfully reallocate funding where necessary. Although a 26 month project spans two years, institutions can still apply for funding for each year, but must ensure no participants are double funded.

### Changing the duration of your project

You can change the duration of your project if this is beneficial to your project. 16 month projects can be extended to 26 months and 26 month projects can be reduced to 16 months. If you would like to change the duration of your project, from 16 months to 26 months or vice versa, you must **make the request in writing, to the UK NA.**

**Please note all mobilities must be completed by the end date of your project.**

## 1.7. Additional Support for Students and Staff

Additional grants are available for students and staff with special needs wishing to participate in Erasmus+ activity and where participation would not be possible without extra financial support. Additional grants are offered where the special need leads to additional mobility costs which exceed the maximum grant allocations allowed and which cannot be recovered from other sources. The special needs grant covers approved actual costs. The special needs grant may be paid in addition to the grant for disadvantaged students undertaking Erasmus+ study mobility.

For further information about Special Needs Grant and the application form please see the "Additional Support (Disability & Special Needs)" section on the 'Manage your Grant' page.

**Students/staff should apply for additional funding via the home HEI before the start of the mobility and the application needs to be submitted to the NA by the HEI's Erasmus coordinator.**

## 1.8. Zero Grant Participants

Zero grant participants may undertake Erasmus+ mobility at the discretion of the HEI. The participants must fulfil all Erasmus+ criteria but they receive no Erasmus+ mobility grant.

**Please note zero grants can only be awarded for the entire duration of a KA107 Mobility.**

HEI's should report the entire duration of mobilities where the students received no funding.

A zero-grant extension is possible if a participant (once on mobility) requests an extension of their mobility period and you do not have sufficient funds to meet the request. Students need to inform the HEI **one month prior** to the end of the mobility period. **Any requests of this nature should be agreed by the NA.**

**Important note:** For students, any months at zero grant count towards the maximum 12 months in any one cycle.

## 1.9. Dissemination

By signing the Grant Agreement with the UK NA, the HEI accepts that their information may be published on the [Erasmus+ Funding Results webpage](#).

Information on use of European logo can be found in clause 1.11 of the grant agreement and is also published on the [UK NA Promotion and Dissemination website](#).

The preferred option to communicate about EU funding is to write “Co-funded by the European Union”, next to the EU emblem on the communication material where the EU emblem is used. The positioning of the text in relation to the EU emblem is not prescribed in any particular way but the text should not interfere with the emblem in any way. The beneficiary may use the Dissemination Platform as per EC's instructions. Please see Article I.10.2 of your Grant Agreement for further information.

## 1.10. Record keeping

HEIs must keep all applications and signed Grant Agreements for a period of **five years** from the date of closure of the applicable Grant Agreement. This includes all applications and mobility agreements with students and staff, and documents concerning disbursement of grants. Please see page 259 of the 2018 Programme Guide and Annex III of the grant agreement for further information.

## 1.11. Selection Procedures

The selection of staff/students as well as the procedure for awarding them a grant must be fair, transparent, coherent and documented and must be made available to all parties involved in selecting students and staff. Please see examples of selection criteria for on

pages 265-267 in the [2018 Programme Guide](#). **HEIs must also provide assistance, when required, in securing visas for incoming and outbound mobility participants.**

## 1.12. Signatures

An original paper copy of the grant agreement between the NA and the HEI must be signed with original signatures and kept in hard copy.

**Grant Agreements and Learning/Mobility Agreements between HEI's and participants can be signed with original / electronic signatures.**

Documents can be signed by one party and scanned to another to be countersigned. Both the HEI and the participant must retain copies that are signed by all parties.

Electronic signatures are acceptable on the following documents, and electronic (or scanned) versions can be retained:

- Inter-Institutional Agreements;
- Participants Grant Agreements (students and staff);
- Learning Agreements between the sending and receiving HEIs and the individual students, and staff teaching or training programmes.

**Important note:** An “electronic signature” may be a scanned and locked pdf signature or other form of secure signature. **It cannot be a typed signature.**

## 1.13. Agreements with Individuals

Before staff/student mobility commences, the HEI must ensure that each student/staff member has signed a mobility Grant Agreement with the **Programme Country institution**.

The agreement must be retained as a record of the mobility. If the HEI does not retain the signed agreement, in hard copy or electronically, the NA may recover the grant at a future audit.

Standard templates of participant agreements form Annex II.6, II.7 and II.8 of the Grant Agreement. The templates are the minimum requirements and HEIs must use the text in full for agreements with students/staff. The HEI may add to the standard text if they wish.

The templates are available on our [website](#) (see: Agreements section).

Any amendment to the agreement shall be requested and agreed by both parties through a formal notification by letter or by email.

## 1.14. EU Survey (Participant report)

30 days before the mobility end date, students will receive an invitation to submit an individual participant report. On the mobility end date, staff will receive an invitation to submit an individual participant report.

The online report request will be automatically generated at the end of the mobility period. Completion of the EU Survey forms part of the Grant Agreement, HEIs are responsible for ensuring individuals complete these reports.

## 1.15. Incoming Erasmus+ Mobility

HEIs must make appropriate provision for the health, safety and security of incoming students and staff in the same way as for any other visitor. This includes compliance with all relevant legislation. Incoming students are not subject to fees or other charges, apart from small charges which would be made to local students; see page 266 of the [2018 Programme Guide](#).

## 1.16. Early Returners, Short Durations and Interruptions of Mobility Periods

If a staff member/student returns home without fulfilling the minimum requirements for the duration of their mobility, for instance due to serious illness, or force majeure<sup>1</sup>, the UK NA may agree to the student/staff member retaining funding for the period of mobility.

In such cases the HEI must notify the UK NA immediately, using the short duration request form that can be obtained from the [Erasmus+ Manage Your Grant page](#) (see: National Agency and EC Forms). The HEI will need to submit evidence (e.g. a doctor's note for illness) if they wish the NA to consider a short duration request. All decisions regarding short durations will be decided by the NA on a case by case basis.

If a staff member/student undertakes an activity not related to their mobility, this should be considered as an interruption day and must be recorded on Mobility Tool+ as such. Any interruption days will not be funded and will be deducted from the mobility duration. Please ensure that a mobility with interruption days still meets the minimum duration for the relevant mobility.

**Please note: Short durations due to force majeure are included in the maximum 12 months mobility per study cycle.**

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<sup>1</sup> Force Majeure is defined on page 316 of the [2018 Programme Guide](#) as “an unforeseeable exceptional situation or event beyond the participant’s control and not attributable to error or negligence on his/her part.”

## 1.17. Setting of Grant Rates

HEIs must pay all grants at the rates given in this handbook and Annex IV of the grant agreement. HEIs must show that reported activities have taken place.

You can find more information in Annex III – Financial and Contractual rules which details the types of documentation that are acceptable.

## 1.18. Allocation of Funds

Grants may be awarded for less than the amount applied for, but not more. The grants budget is allocated on the basis of:

- overall budget for grants;
- applications from individual HEIs, as assessed by the NA;
- grant rates established by the NA, within EC guidelines.

It is recommended that you do not exceed your contracted amount. It is important that the interim report is completed as accurately as possible.

## 1.19. Reporting Deadlines

<b>To be completed by HEI for 16 month and 26 month agreements</b>		
<b>Interim Report</b>		Contracted period; to include all confirmed and <b>projected</b> students/staff 16 & 26 month projects: <b>31.07.2019</b>
<b>To be completed by HEI for 16 month agreements</b>		
<b>Beneficiary Mobility Data</b>	<b>Final</b>	Mobility Tool+ to include all confirmed student and staff mobility <b>30.09.2019</b>
<b>Beneficiary Report</b>	<b>Final</b>	Narrative report to demonstrate the qualitative and quantitative aspects of the project. <b>29.11.2019</b> 60 days from project end date.
<b>To be completed by HEI for 26 month agreements</b>		
<b>Beneficiary Mobility Data</b>	<b>Final</b>	Mobility Tool+ to include all confirmed student and staff mobility <b>31.07.2020</b>
<b>Beneficiary Report</b>	<b>Final</b>	Narrative report to demonstrate the qualitative and quantitative aspects of the project. <b>29.09.2020</b> 60 days from project end date.

## 1.20. Interim Report

All HEIs are required to submit an ‘Interim Report’ during the lifetime of their project. For this report you would need to ensure that all mobilities that have taken place, and are expected to take place until the end date of the project are recorded on Mobility Tool+. You will also be required to complete a short narrative report which can be found under the “Reports” tab on Mobility Tool+.

## 1.21. Final Report

All HEIs are required to submit a final report at the end of every project. The report will include a narrative report to demonstrate the qualitative aspects of the project implementation in addition to the quantitative data. **The final report must be submitted within 60 days of the project end date (which can be found in Article 1.2 of the grant agreement).**

The narrative final beneficiary reports will be assessed by experts who have completed relevant assessor training. **The maximum number of points that can be awarded is 100.** Consequences of low scores are set out in Annex III (Financial and Contractual Rules) 'IV. Rules and conditions for grant reduction for poor, partial or late implementation.'

## 1.22. Monitoring Special Needs on Mobility Tool+

Tick the box "Participant with Special Needs" in case the student or staff has disclosed the information that they have physical, mental or health-related conditions. The box should be ticked even if the participant does not receive EU budget (in which case, the "EU Special needs support" field should remain at zero). More information can be found from the document [here](#).

## 1.23. Payment conditions

A first pre-financing payment of 40% will be made 30 days after the NA has countersigned the Grant Agreement.

Payment following a report is subject to:

- NA approval of the report, including the level of mobility requested;
- Payment of any debts to the NA.

In the event of reduced mobility levels, HEIs may be invoiced for recovery of any unspent grant or the NA may offset any debt against payments.

## 1.24. Bank accounts and currency

All payments from the UK NA to the HEI are made in euros. The HEI must ensure that its designated bank account can receive payments in euros. The UK NA is not responsible for any delay or exchange rate losses caused as a result of the HEIs bank account's inability to receive such payments.

For further information, please see clause I.4.9 of the 2018 grant agreement.

As most HEIs general accounts for Erasmus+ funding are in euro, when passing on funding to participants and/or beneficiaries in other currencies the method used for determining currency conversion rates is at the discretion of the HEI provided it follows the normal accounting practice of the HEI and is applied consistently.

## 2. Grant awards

The Grant Agreement details the payment arrangements as well as the bank account or sub account to which funds will be transferred. Grant recipients may not benefit from any other EC funding for the same activity, even if this is across different project years.

The Erasmus+ grant is intended to co-finance mobility activity. Under no circumstances may the grant give rise to a profit. Please see page 250 of the 2018 Programme Guide for further information.

Amendments to agreements must be requested in writing. Amendments to agreements then take the form of a letter from the NA or a written amendment signed by both parties.

Please note that if information contained in this handbook differs from that in the Grant Agreement, then the Grant Agreement will take precedence.

### 2.1. Grant Agreements and Annexes

The Grant Agreement is split into several sections and annexes:

#### **Information within the Grant Agreement:**

Special Conditions (project specific information)

General Conditions (applicable to all beneficiaries under Key Action 1)

Financial and Contractual Rules (applicable to all beneficiaries under Key Action 1)

#### **Legal Representative**

**Important:** Please ensure that you check your Grant Agreement to see the correct person is listed as the legal representative and the contact for the project. If the legal representative or contact person for your project has changed since the submission of your application, you will be required to update the UK NA.

#### **Annex I: Special Conditions**

This contains key rules specific to your institution's project.

#### **Annex I (Part two): General Conditions**

The General Conditions provide an overview of the obligations of beneficiaries. They can be found on the Erasmus+ [website](#).

#### **Annex II: Budget Summary**

This is a breakdown of the budget and it shows the number of participants, durations and amounts awarded for travel and individual support per activity type, per Partner Country.

### **Annex II.6, II.7 and II.8: Participant Documentation**

Template documents are agreements to be used between the HEI and participants. The text in the templates is the minimum requirement, however, you can add to the text. The templates can be found in the 'Agreements' section [here](#).

### **Annex III: Financial and contractual rules**

This annex provides information on the financial and contractual rules surrounding the Grant Agreement. There are two versions of this annex; one for single organisation beneficiaries and one for consortia beneficiaries. It is the responsibility of the beneficiary to read this information and to ensure compliance.

### **Annex IV: Applicable Rates**

This annex clearly states what rates are applicable for incoming and outgoing students/staff for a KA107 project.

### **Annex VII – Bank Details Form**

If for any reason your bank account details are not correct or require amendment Annex VII must be completed and returned to the UK NA.

The form must be signed with a wet signature and dated by the finance department or relevant contact and on headed paper.

## **2.2. Grant Management**

The UK HEI is awarded the grant for all successful countries. It is then agreed between the UK HEI and the partner HEIs how the grant will be managed. However, the funding is the responsibility of the UK HEI who is in receipt of the Erasmus+ grant.

## **3. Making changes to your project**

In some cases, a change to your original project may be possible within the contract. Details of changes that can be made without amendment are shown in article 1.13 of the grant agreement. You can also find this information in the [European Commission's ICM Handbook](#) on page 26-27.

### **3.1. Budget Transfers**

Information in regards to budget transfers can be found in Article I.3.3. of the 2018 Grant Agreement. The direction of mobility flows (e.g. incoming/outgoing) may be modified provided that this type of mobility flow is permitted for the relevant country. The rules for each budget envelope can be found [here](#). All changes may not exceed 40% of the total project budget allocated in Annex II, without a formal amendment.

## 4. Student Mobility

### 4.1. Academic Fees

No university fees (for tuition, registration, examinations, access to laboratory and library facilities, etc.) may be paid at the host HEI. However, small fees may be charged for costs such as insurance, student unions, the use of miscellaneous material such as the photocopying of academic material, and use of laboratory products on the same basis as these are charged to local students.

HEIs may not request any payment or charges from outgoing students in connection with the organisation or administration of the Erasmus+ mobility period.

#### **Tuition Fee Contribution and Support (formerly the Erasmus tuition fee waiver)**

For the 2018/19 academic year, Tuition Fee Contributions and Support will apply to students who start courses at institutions in the UK on or after 1 September 2012 who are taking an Erasmus+ study year or Erasmus+ traineeship for a complete academic year abroad. The definition of a complete academic year for this purpose is at least 24 weeks (excluding weekends and the usual holidays).<sup>2</sup>

### 4.2. Grant Status of Students and National Schemes

All students' entitlements to national grants or loans for study at their home HEI must be maintained during their period abroad. Entitlement must not be discontinued, interrupted, or reduced while they are studying in a participating country and receiving an Erasmus+ mobility grant.

### 4.3. Agreements with Participants

Before mobility has commenced, the home HEI must ensure that all students have a mobility Grant Agreement signed by the student and the home HEI, formally accepting the grant and acknowledging the obligations. Please see section 1.13 for guidance on eligible signatures.

Failure to sign and retain the agreement may result in the NA recovering the grant at a future audit, please be aware that scanned copies of documents are acceptable for audit.

In addition, the student, the home HEI and the host HEI must sign the Learning Agreement. From a best practice point of view, this should be signed before the mobility commences.

Learning Agreements may be signed electronically, and if HEI's have an IT system in place to produce the Learning Agreement or the Transcript of Records, they can use this.

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<sup>2</sup> For the tuition fee rules for England, click [here](#); for Wales, click [here](#), for Scotland, click [here](#), for Northern Ireland, click [here](#)

The “During the mobility” section of the Learning Agreement should be completed if there are changes after the student has started their period abroad. The section “After the mobility” should be completed by both HEI’s unless this information is kept in another format (with Erasmus+ documentation relating to the student).

Amendments to the agreement must be agreed through a formal notification by both parties, either by letter or electronically, with copies retained for audit purposes. If you wish to issue an amendment via email, a response confirming the change is necessary. Evidence of this should be retained for audit purposes.

There must be documentary evidence of the duration of the mobility. These dates should be provided in the Transcript of Records for study (see the Learning Agreement “After the Mobility”), of the traineeship certificate (see Learning Agreement for traineeships “ after the Mobility”) or if the HEI wishes, a Certificate of Attendance may be appended to the Transcript. These documents may be supplemented by other supporting documents, e.g. where any additional time needs to be justified. Boarding passes will not count as sufficient evidence, but should be retained for audit purposes.

#### 4.4. Erasmus+ Student Charter

HEIs must issue each student with an Erasmus+ Student Charter before the mobility period commences, as it is an annex to the Learning Agreement.

#### 4.5. Multiple Erasmus+ Periods

Students may undertake up to 12 months mobility for each cycle of higher education study. This may be any combination of study and traineeship, provided that each mobility meets the minimum requirements for duration etc.

The maximum duration applies if a student has undertaken a degree of the same level previously; this rule applies to each study cycle.

Students can undertake up to four mobilities providing they do not exceed a total of 12 months. Two or more mobilities (for example one of eight months and one of three months) in the same year should be reported as separate mobilities. A gap between mobilities is acceptable.

For degrees covering two cycles, for example a first degree leading to a master’s level qualification, mobility periods up to a total duration of 24 months may be undertaken.

#### 4.6. OLS

**Please note: OLS is not available for KA107 project mobilities**

## 4.7. Proof of payment

All payments made as a result of Erasmus+ funding may be subject to audit by the NA or by other bodies. The HEI have to provide proof that the grant has left the HEI's bank account and has been received by the student i.e. via bank statements or email's. Failure to do this may result in the NA recovering the grant.

## 5. Student Study Mobility

### Eligible Students

In order to take part in student study mobility, students must be:

- Formally registered at a Partner Country HEI whom has signed the international version of the Inter-Institutional Agreement.
- Formally registered at a UK HEI which holds an ECHE and undertaking higher education studies leading to a recognised degree or other recognised tertiary level qualification, up to and including the level of doctorate; or
- Enrolled in short-cycle higher vocational education (in the UK this includes Foundation Degree and HND courses) at an HEI which holds an ECHE;

Students undertaking study mobility at undergraduate level must be enrolled at least in their second year of higher education.

Part time students are eligible to participate in Erasmus+ providing they study full time during the mobility period.

### 5.1. Duration of Study Mobility

Study mobility must be between three to twelve months excluding travel time. The duration should be based on full months of 30 days (regardless of whether the months are of 28, 29, 30 or 31 days), plus any remaining days. A year is considered as 360 days.

For students, the duration is calculated from the first day the student is required to be at their place of study. and the end date is the last date they need to be present and may not be the actual date of departure. If the student selects to leave after the date they are required to be present, the sending organisation should only fund the student until the last date they are required to be present.

### Prolongation of students' mobility

An extension to the original mobility period may be agreed between the home HEI and the host as long as the following conditions are met:

- The request for extension of the mobility period must be asked for at least **one month** before the end of the mobility period initially planned.

- The extension must immediately follow after the current mobility period. There should be no gaps and the extension will need to be agreed by all parties, in writing.

**No student mobility period, including any extension granted, will be funded for more than 12 months (360 days)**

## 5.2. Eligible Student Study Activity

Grants for study can be awarded only for full time undergraduate or postgraduate study placements, including thesis preparation, leading to a recognised diploma or degree, at a partner country HEI who has signed the international version of the inter-institutional agreement.

PhD students may receive a grant for study, provided their work is with a partner HEI with whom their home institution has an Inter-Institutional Agreement and where any research or other activity contributes directly to the PhD.

## 5.3. Recognition

Only periods of study which are part of the student's curriculum are eligible. The HEI must be satisfied that the study is integrated into the student's current degree course and how the study will be formally recognised as part of their degree.

Full recognition must be awarded, preferably using ECTS credits. The means of recognition must be included in the mobility agreement, for more information see: [http://ec.europa.eu/education/tools/ects\\_en.htm](http://ec.europa.eu/education/tools/ects_en.htm)

We would recommend looking at page 3 of the ECHE annotated guidelines which you can find [here](#)

EuroPass is also an acceptable way in which to provide recognition. For more information, please see the EuroPass website: <http://europass.cedefop.europa.eu/>

Upon satisfactory completion of the mobility period, the host HEI must provide the student with a Transcript of Records completed in accordance with the Learning Agreement. The receiving institution should send the Transcript of Records to the student and the sending institution within five weeks after publication/proclamation of the student's results.

Credit/recognition of the studies undertaken by the student at the host HEI may be withheld only if the student fails to achieve the level of academic attainment required by the host HEI. Or if they fail to satisfy the agreed conditions required by the participating HEIs for recognition. It is at the HEI's discretion whether to report a mobility (and allow the student to keep the grant) if a student has completed the minimum duration required but does not gain all the planned credits for the mobility.

## 6. Student Traineeship Mobility

Traineeships are defined as a period of time a student spends in an enterprise or organisation in another country, with a view to acquiring specific competences that are required by the labour market, which is relevant to the student's higher education. Traineeships are for those students enrolled in a HEI at Short, First (Bachelor or equivalent) and second-cycle (Master or equivalent) as well as Doctoral candidates.

For a list of eligible / ineligible organisations please see page 35 of the 2018 programme guide.

### 6.1. Duration of Student Traineeships

Traineeships must be between two and twelve months, excluding travel time. The duration should be based on full months of 30 days plus any remaining days.

The duration of a placement is calculated from the first day the student is required to be at their place of study. The end date is the last date they need to be present and may not be the actual date of departure.

### 6.2. Eligible Student Traineeship Activity

There are two different provisions for traineeships:

1. Traineeships embedded in the curriculum (counting towards the degree);
2. Voluntary traineeships (not obligatory for the degree);

**Traineeship placements must be full time, applicable to the type of work.**

#### **Traineeships in “digital skills”**

The commission will be tracking traineeships in “digital skills” which are also open to Switzerland and the Faroe Islands. The participation of Switzerland and the Faroe Islands is strictly restricted to outgoing student mobility for traineeships in “digital skills”. Please make sure that these are recorded on Mobility Tool+ by ticking the box on the student record for Digital Traineeships.

### 6.3. Recognition

The home HEI must give full recognition for traineeships undertaken during a degree course. For traineeships which are part of the student's curriculum, full recognition must be awarded wherever possible by using [ECTS credits](#).

In the case of a traineeship that is not part of the curriculum of the student, the HEI must provide recognition by at least recording the traineeship in the Diploma Supplement.

After the mobility, the receiving organisation should send a transcript of records to the trainee and sending institution. Students must complete their placements to the standards of the host organisation in order for it to be fully recognised. If a student does not fulfil these requirements, the HEI may use discretion as to whether to count the mobility and allow the student to keep the grant.

## 6.4. Student Grant Rates

Individual Support grant rates for student mobilities between Programme and Partner Countries

<b>From</b>	<b>To</b>	<b>Amount</b>
<b>Partner Countries</b>	<b>Programme Countries -&gt; UK</b>	<b>€900 per month</b>
<b>Programme Countries (UK)</b>	<b>Partner Countries</b>	<b>€700 per month</b>

### Student Travel Grants

In addition to the Student Mobility Grant amounts, students going to/coming from Partner Countries will receive the following amounts, to support them in covering their travel costs:

<b>Travel Distance</b>	<b>Amount (Per Participant)</b>
<b>Between 0 - 99 KM:</b>	20 EUR
<b>Between 100 - 499 KM:</b>	180 EUR
<b>Between 500 - 1999 KM:</b>	275 EUR
<b>Between 2000 - 2999 KM:</b>	360 EUR
<b>Between 3000 - 3999 KM:</b>	530 EUR
<b>Between 4000 - 7999 KM:</b>	820 EUR
<b>8000 KM or more:</b>	1,500 EUR

To calculate distance between the sending and receiving organisations, the HEI must use the [EU distance calculator](#). We recommend using either Google Chrome or Mozilla Firefox,

## 6.5. Student Mobility –Combined

A study period and a traineeship can be combined, for a minimum of 3 months (or one academic term) and a maximum of 12 months.

## 7. Staff Mobility - teaching

Erasmus+ staff mobility can be undertaken by both teaching and administrative staff. To be eligible, they must hold a contract of employment with the sending HEI.

Staff mobility is expected to contribute to the overall priorities of Erasmus+, the EU Agenda for Modernisation of Higher Education and the individual HEI's international strategy, as summarised in the ECHE. Staff mobility is therefore not solely intended to be for the benefit or career development of the individual member of staff.

### 7.1. Staff Teaching Programme

Prior to departure, the home and host HEIs must formally agree the teaching programme, using the Staff Mobility Agreement. This can be completed electronically. Any amendments must also be agreed and retained.

There must be documentary evidence of the duration of the mobility period signed by the Host Organisation. At the end of a teaching period abroad the host HEI must confirm the activity undertaken and start and end date. **Failure to provide this may result in recovery of the grant in the event of an audit.**

### 7.2. Duration of Teaching or Training Period

Mobility for teaching may be from **five days to two months**, excluding travel time. The individual must deliver at least eight hours of teaching per week (or for any shorter period of stay). If the mobility lasts longer than one week, the minimum number of teaching hours for an incomplete week should be proportional to the duration of that week.

### 7.3. Staff Mobility - Combined

Staff can participate in mobilities that combine both teaching and training.

For a staff member undertaking a teaching activity combined with a training mobility during a single period abroad, **the minimum number of hours of teaching per week is reduced to 4 hours.**

If the mobility lasts longer than one week, the minimum number of teaching hours for an incomplete week should be proportional to the duration of that week.

If the staff member wishes to combine teaching and training in one mobility at the same institution, the staff member submits a single application and Mobility Agreement to the home institution. Information regarding the training period can be easily added to the Mobility Agreement for Staff Teaching.

The sending institution would then report the single mobility on Mobility Tool+ as a “teaching mobility” but will select the “Combined Teaching and Training”. In addition to selecting this option, the beneficiary should enter the name of the organisation providing the training activities, its location and the duration of the training in the field "Mobility Comments".

## 7.4. Staff Mobility Grants

Staff subsistence and travel costs are paid as flat rates, regardless of whether the HEI pays on receipted expenditure. Funding can be awarded for 2 travel days. If the staff member is participating in activities on the same day as travelling they are not entitled to a travel day. Please note travel days are not included within the minimum duration.

The table below shows the grant rate for individual support for staff:

Receiving Country	1 Day	5 Days	6 Days	1 week	2 Weeks	3 Weeks	4 Weeks	2 Months (60 days)
UK	180	900	1,080	1,260	2,520	3,402	4,284	8,568
Partner Country	180	900	1,080	1,260	2,520	3,402	4,284	8,568

Up to the 14th day, the daily rate is used. Between the 15th and the 60th day, 70% of the daily rate is used per day.

### Staff Travel Grants

Staff travel grants are paid according to distance travelled, at the following rates:

Travel Distances	Amount (per participant)
Between 10 - 99 KM:	20 EUR
Between 100 - 499 KM:	180 EUR
Between 500 -1999 KM:	275 EUR
Between 2000 - 2999 KM:	360 EUR
Between 3000 - 3999 KM:	530 EUR
Between 4000 - 7999 KM:	820 EUR
8000 KM or more:	1,500 EUR

To calculate distance, the HEI must use the [EC distance calculator](#).

## 7.5. Calculating Travel

If a staff member undertakes two separate mobilities in two different countries without returning home the travel for the first mobility is calculated on the distance between the home location and the first mobility location. The travel grant for the second mobility is based on the distance between the location of the first mobility and the second.

If a staff member is already abroad on a non-Erasmus+ activity in a Partner country and wishes to undertake a mobility in a second Partner country, the distance should be calculated from the place of departure to the second location.

For a staff member undertaking consecutive training mobilities within the same country, the travel distance calculated depends on how far the receiving institutions are from one another. If there is less than 100km between the two receiving institutions, the activities are considered as one combined mobility. If there is more than 100km between the two receiving institutions, the activities are separate mobilities and the travel for the second mobility should be calculated from the first receiving institution to the second.

## 7.6. Proof of payment

All payments may be subject to audit by the NA or other bodies. If there is an audit, the NA will ask for evidence that the grant has left the HEI's bank account or has been received by a staff member. Failure to provide this may result in the NA recovering the grant.

## 7.7. Agreements with Participants

Before staff mobility commences, the sending HEI must ensure that the staff member has signed a mobility Grant Agreement, formally accepting the grant and acknowledging the obligations associated with its acceptance.

The staff mobility agreement must be signed prior to departure and the final mobility programme should be formally agreed by both the sending and receiving institution. In the case of invited staff from enterprises and staff training at programme country enterprises the enterprise must sign this agreement.

Please see section 5.15 of this guide for information on signatures. Agreements must be retained as record of the mobility, failure to sign and retain the agreement may result in the NA recovering the grant.

## 7.8. Recognition of Staff Mobility

HEIs must recognise staff mobility assignments, as described in the ECHE and in the Agreement with the staff member. The staff member should disseminate learning to their colleagues at the appropriate level in line with requirements for dissemination of outcomes of activity (see pages 308 – 311 of the 2018 Programme Guide.)

# 8. Staff Mobility – training

Erasmus+ training supports the professional development of the HEI staff. Teaching and non-teaching staff including administrative and other staff employed a programme or partner country HEI. The training period may be in another HEI or any other appropriate organisation. A host HEI must sign an Inter-institutional agreement with the Partner Country HEI.

Training events may be in the form of job shadowing, observation, attendance at a workshops or courses etc.

**Important note: Conferences are not funded under Key Action 1.**

## 8.1. Staff Training Programme

Prior to departure, the full training programme must be agreed by the home and host HEI or enterprise. Minimum requirements for the training programme are in the staff mobility agreement. Evidence must be kept that this has been agreed prior to departure and any amendment must be formally agreed and retained.

## 9. Organisational Support (OS)

For Key Action 107 projects, all HEIs/consortia who have received grants will receive a grant for Organisational Support (OS). OS is based on the total number of mobilities, including staff, students and invited staff from enterprises or other organisations.

The OS grant rate is **€350 per participant**.

OS funding is included in the 40% initial pre-financing payment, based on the number of mobilities within the Grant Agreement.

If the final outgoing student and staff mobility is below the final contract mobility then the HEI may be asked to refund part of the OS funding. A margin of 10% is allowed, so that if the number of mobilities drops by up to 10%, the OS will remain the same. However, OS will not exceed the maximum amount as shown in the Grant Agreement. If no mobilities take place the final OS grant will be zero.

### 9.1. Eligible OS activity

HEI's may decide how the OS grant is allocated provided it is used on activities related to Erasmus+ mobility and that the HEI observes the EC and NA's rules as stated in the Grant Agreement and the 2018 Programme Guide.

OS is a contribution to any costs incurred by the HEI in supporting student and staff mobility, both incoming and outgoing, in order to comply with the quality commitments in the ECHE. A list of examples can be found on pages 44 - 45 of the 2018 Programme Guide.

### 9.2. Using OS for insurance and visas

Insurance and visa costs for participants can be covered by OS. The sending HEI must verify that outgoing students are informed in advance about the situation in the host country in terms of insurance and have sufficient insurance coverage. For student traineeships, normally it is the receiving organisations responsibility to provide insurance, or cover the cost

of insurance. However, if it is not possible, it is up to the sending institution to determine whether the cost of insurance can be covered by OS funds.

For further information about insurance please see page 10 of the 2018 Programme Guide.

## 10. National Agency Monitoring Activities

The UK NA is required under its contract with the EC to undertake monitoring activities, audits and checks on a representative sample of organisations each year. The checks vary in scope and depth according to the type of check performed. These checks are carried out to ensure that the management of the Erasmus+ Programme is satisfactory and within the terms of the grant agreement and programme rules.

Beneficiaries are accountable to the UK NA for the implementation of the project, for the use of funds received and for the amounts paid to participants. Therefore, beneficiaries should ensure that appropriate reporting and monitoring procedures are in place. Project monitoring should involve checking the financial performance and general performance of the project against the objectives set out in the application. Beneficiaries must gather and retain all necessary information and documentary evidence, which demonstrates clear and transparent management of the project as this may be inspected by the EC.

**Please refer to Section V.I of Annex III- Financial and Contractual rules**

### 10.1. Documentary Evidence

Please see, Financial and Contractual rules of your Grant Agreement Annex III.1.2 calculation and supporting documents for unit contributions for requirements regarding documentary evidence of mobility.

### 10.2. Feedback from Audit Visits Carried Out by the NA

At the end of an audit visit the HEI will receive informal feedback. The NA will give formal feedback in the form of a draft visit report, taking into account any initial comments from the HEI, within 30 days of the visit.

The HEI will have 30 days to respond to the draft report during which time the NA may accept missing information or other explanations as necessary. At the end of the 30 day period the NA will issue their final report.

### 10.3. Repayment of Grant Monies

Following validation of final report data, and adverse audit findings, the NA will request reimbursement of any funds overpaid or incorrectly reported. The NA will not enter into an agreement for future years with the institution until outstanding amounts are repaid.

## 10.4. Practicalities for Audit Visits Carried Out by the NA

HEIs selected for audit visits will be contacted in advance to agree a date and will be advised of which areas are to be covered. A sample list of mobilities to be examined will normally be given in advance of the visit. To aid the process the HEI should prepare copies of the documentation as described in 1.15 agreements with individuals and Annex III of the grant agreement.

## 11. Useful Links

- [UK National Agency HE Manage your grant](#)
- [Erasmus Charter for Higher Education](#)
- [European Commission Erasmus+ website](#)
- [Participant Portal](#)
- [Mobility Tool+](#)
- [EC Distance Calculator](#)
- <https://www.erasmusplus.org.uk/higher-education-partner-opportunities>
- [Mobility Tool+ Guidance](#)
- [EuroPass website](#)

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