

2019 Key Action 2 (KA2)

Higher Education Handbook

Strategic Partnerships for Higher Education Mobility Projects

KA203

Version 2

This handbook is a guidance document for the management of Key Action 203 Projects. This handbook is designed to provide information to support your grant agreement including all associated annexes and the [2019 Erasmus+ Programme Guide](#). Your Grant Agreement and the 2019 Erasmus+ 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 2019 Erasmus+ Programme Guide, the content of the Grant Agreement, its annexes and the Programme Guide will take precedence.

If you have any queries or feedback about the content of this Handbook, please contact erasmus@britishcouncil.org.

Overview of the handbook

This is version 2 of the 2019 Key Action 203 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
5	Change of article title from Brexit to the Transition Period	5
5	New article 2 – Coronavirus guidance	5
7	Article 4 – new annex added – Virtual Activity Addendum	7
n/a	New article 6 – Covid-19 Specific Measures	11
11	Article 7.2 – change of terminology from Participant Portal to Organisation Registration System	14

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1. The transition period

The latest information about UK participation in Erasmus+ after the transition period can be found on the [Transition period update page](#) of the Erasmus+ UK website. Please check this page regularly or [subscribe](#) to our newsletter.

2. Coronavirus guidance

For the latest updates and guidance on managing Erasmus+ projects during the outbreak of the coronavirus disease, please visit our [dedicated webpage](#). Please check this page regularly or subscribe to our newsletter.

3. General

Key Action 2 is expected to result in the development, transfer and/or implementation of innovative practices at organisational, local, regional, national or European levels.

For more information about Erasmus+ and Key Action 2, please refer to the following sections of the 2019 Erasmus+ Programme Guide:

General Information about the Erasmus+ Programme	Pages 5 – 24
Key Action 2 Overview	Pages 99 – 124
Information for Applicants	Pages 252 – 270
Specific Rules relating to Key Action 2 Strategic Partnerships	Pages 295 – 307
Dissemination and exploitation of results	Pages 314 – 318
Glossary of Key terms	Pages 320 – 328

This operational handbook only applies to KA203 (Strategic Partnerships) projects.

3.1 GDPR Compliance

For the purposes of the Data Protection Legislation, the European Commission – Department for Education is the Controller, the Processor is the UK National Agency and the beneficiary is the Sub-Processor.

All personal data contained related to the implementation of an Erasmus+ project shall be processed in accordance with:

- National legislation by the NA, in particular the UK Data Protection Act 2018;
- in accordance with Regulation (EC) No 45/2001 and Regulation (EU) 2016/679 of the European Parliament and of the Council on the protection of natural persons with regard to the processing of personal data and on the free movement of such data (and/or such law(s), regulation(s) and secondary legislation as may transpose the General Data Protection

Regulation into the domestic law of all or any part of the United Kingdom), and repealing Directive 95/46/EC as from its entry into force on May 20181;

- the Data Processing Clauses as set out in Annex VIII of the Grant Agreement.

For more information please refer to the Grant Agreement – Special Conditions – Article I.6 and I.19, the Grant Agreement – Annex VIII and the 2019 Erasmus+ Programme Guide - Data Protection article.

4. Grant Agreement Issuing and Signing

4.1 Payment Conditions

The aim of the pre-financing is to provide the beneficiary with a float.

A first pre-financing payment of either 40% or 70% (specified in Article I.4.2 of your 2019 Grant Agreement) of the HEI's agreed grant amount will be made 30 days after the NA has countersigned the grant agreement which has been signed by the nominated legal representative and returned to the UK NA.

4.2 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 HEI's bank account's inability to receive such payments.

Beneficiaries with general accounts in a currency other than the euro must convert costs incurred in another currency into euros at the average of the daily exchange rates published in the C series of the Official Journal of the European Union, determined over the corresponding reporting period ([available here](#)).

If no daily euro exchange rate is published in the Official Journal of the European Union for the currency in question, conversion must be made at the average of the monthly accounting rates established by the Commission and published on its [website](#), determined over the corresponding reporting period.

Beneficiaries with general accounts in euros must convert costs incurred in another currency into euros in accordance with their usual accounting practices.

Costs of the payment transfers are borne as follows:

- a) The NA bears the costs of transfer charged by its bank;
- b) The coordinator bears the costs of transfer charged by its bank;
- c) The party causing a repetition of a transfer bears all costs of repeated transfers.

4.3 3.3 Grant Awards

The Grant Agreement details the payment and reporting arrangements for the project.

The NA must make payments to the coordinator in Euros. The coordinator must make all payments to the other beneficiaries by bank transfer and keep appropriate evidence of the amounts transferred to each beneficiary for any checks and audits.

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

4.4 3.4 Grant Agreement and Annexes

The Grant Agreement (**Special Conditions**) is split into several sections and annexes:

- **Annex I: General Conditions**

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

- **Annex II: Budget details and project description**

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

This annex provides information on the financial and contractual rules surrounding the Grant Agreement. It is the responsibility of the beneficiary to read this information and to ensure compliance.

- **Virtual Activity Addendum:** additional rules to those in Articles I.2 and II.2 of Annex III and only apply to cases where virtual activities need to be organised due to Covid-19

- **Annex IV: Applicable Rates**

This annex defines what rates are applicable to each budget category.

- **Annex VII: Bank Details Form**

This must be submitted at Grant Agreement countersigning, even if no changes have been made to the institutional bank account. This will ensure that the UK NA makes all payments to the correct account.

The form should be signed by someone (with the requisite authority to make financial decisions on behalf of the HEI) from the managing HEIs finance department. Alternatively, this form can be completed on letter-headed institutional paper and submitted to the UK NA. There are further signing instructions provided with this annex and they should be consulted prior to the submission of your Bank Details form.

- **Annex VIII: GDPR Multi Beneficiary UK National Agency Processor to Sub-processor Contractual Governance**

This annex sets out the contractual governance that manages the data that is exchanged between the UK NA and the beneficiary.

Important: Please ensure that you check your Grant Agreement to confirm that the correct details have been listed for the legal representative and contact person 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. It is recommended that this is done at your earliest convenience so that there any potential delay to the countersigning of your Grant Agreement is minimised.

4.5 Signatures

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

5. Project activities

5.1 Organisation and Partner Roles

We endeavour to provide as much help and support possible to beneficiaries throughout their project lifetime. It is, however, your overall responsibility to ensure the quality of your planned placements and project activities.

To ensure that all parties involved are committed to delivery of a high-quality project, all roles and responsibilities need to be clearly agreed and outlined in contracts or partnership agreements. Some areas for you and your partners to consider when implementing a high-quality project include:

- Ensuring a strong and committed partnership is in place prior to project implementation;
- Ensuring that the training content is relevant to the needs of participants as well as meeting the objectives of Key Action 2;
- Ensuring that there are clear and appropriate monitoring arrangements in place;
- Ensuring that you have clear management strategies in place, with appropriate personnel responsible for managing the project;
- Having clear financial reporting mechanisms and an appropriate accounting system in place to ensure all evidence of expenditure is recorded;
- Having quality control measures in place to allow you to evaluate the impact and the progress of the project on an on-going basis and ensure appropriate action is taken if required within the project budget and project time-frame;
- Having a (SMART) dissemination plan in place to ensure that all parties disseminate project results to the relevant target groups, using appropriate channels at different stages of the project; and
- Ensuring that participants are supported with relevant preparation prior to placement and practical support available throughout the period of the project.

5.2 Period of Activity

The project duration is between 24 and 36 months, as specified in the HEI's application form and Grant Agreement. All activities must be completed by the project end date as specified in article 1.2.2 of the grant agreement. If the grant agreement has not been signed by both parties (the NA and the HEI) prior to activity taking place, the HEI will be fully responsible for any risks that may arise from such activity (as with any activity that takes place outside the terms of the agreement).

For 24-month projects, the grant is awarded for activities taking place from 1 September 2019 to 31 August 2021.

For 36-month projects, the grant is awarded for activities taking place from 1 September 2019 to 31 August 2022.

Changing the duration of your project

You can change the duration of your project if this will be a benefit to you. 24-month projects can be extended up to 36 months and 36-month projects can be reduced to minimum of 24 month. If you would like to change the duration of your project, you must make the request in writing to the UK NA no later than 30 days prior to the project end date, clearly stating the project number and the reasons for the extension.

5.3 Making changes to your project

Change of project coordinator and project contacts

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.

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 a 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

5.4 Selection procedures

Sending organisations are responsible for selecting participants to undertake mobility activities. The selection process must be fair, transparent, coherent, documented and shall be made available to all parties involved. The profile of participants must correspond to the eligibility criteria set out in the 2019 Erasmus+ Programme Guide. The sending organisation should define the selection procedure, i.e. how participants will be invited to apply, the documentation that the applicants need to submit and how it will be treated.

5.5 Risk Assessments

As all Erasmus+ placements are transnational, sending organisations and participants should regularly consult the travel guidance published by the Foreign Commonwealth Office before travelling. You can search for an individual countries travel advice via the following [link](#).

Risk assessments should be completed for host organisations, accommodation, travel arrangements and any other areas you deem appropriate. A good risk assessment will help avoid accidents and aid the smooth running of the project. The UK National Agency recommends that you follow the risk assessment procedures used within your organisation. Further information on risk management and how to conduct a risk assessment can be found on the UK Government's Health and Safety website [here](#).

5.6 Protection and safety of participants

Protection and safety of participants involved in Erasmus+ projects are important principles of the Programme. All participants should have the opportunity to take full advantage of the possibilities for personal and professional development and learning. This should be assured in a safe environment which respects and protects the rights of all persons.

To this end each organisation participating in the Erasmus+ Programme must have in place effective procedures and arrangements to promote and guarantee the safety and protection of the participants in their activity. With this regard, all participants must be insured against the risks linked to their participation in mobility activities. The Erasmus+ Programme does not define a unique format of insurance, nor does it recommend specific insurance companies. The Programme leaves it up to project organisers to seek the most suitable insurance policy according to the type of project carried out and to the insurance formats available at national level. Furthermore, it is not necessary to subscribe to a project-specific insurance, if the participants are already covered by existing insurance policies of the project organisers.

In either case, the following areas must be covered:

- wherever relevant, travel insurance (including damage or loss of luggage);
- third party liability (including, wherever appropriate, professional indemnity or insurance for responsibility);
- accident and serious illness (including permanent or temporary incapacity);
- death (including repatriation in case of projects carried out abroad).

If applicable, it is strongly recommended that participants in transnational activities are in possession of a European Health Insurance Card. This is a free card that gives access to medically necessary, state-provided healthcare during a temporary stay in any of the 28 EU countries, Iceland, Liechtenstein and Norway, under the same conditions and at the same cost (free in some countries) as people insured in that country. More information on the card and on how to obtain it is available [here](#).

5.7 Child Protection and the protection of vulnerable adults

Key Action 2 projects may involve the participation of individuals under the age of 18, either domestically or transnationally. It is the responsibility of all organisations within the partnership to ensure that all children participating in activities are protected. Child protection means protecting children and young people from abuse. This could be: physical abuse, emotional abuse, sexual abuse or neglect.

Some aspects of the Key Action 2 project can include taking vulnerable or young individuals out of their normal environment or out of normal hours for study. In some circumstances this could include the transnational mobility of students. All Higher Education Institutions involved in any project are responsible for minimising the risk of harm by identifying and managing potential risks and having a positive and open relationship with the participants involved in the project. You must consider that

while in the UK there are strict child protection laws and UK Higher Education Institutions should have a clear child protection policy, other countries may not have such structure and procedure in place. It is important that your organisation and project partners communicate effectively and put appropriate measures in place to ensure the protection and safeguarding of young or vulnerable persons.

5.8 Participant Withdrawals

It is important to ensure that you take all necessary steps to avoid participant withdrawals pre or mid-placement. This includes:

- managing expectations to ensure that your participants know exactly what to expect while on their placement;
- providing partners and host organisations with clear information regarding your participants so that both parties are aware of the proposed activities and intended outcomes;
- ensuring that you have good quality selection plans in place to ensure that you have involved the correct participants. The information that you provide to participants at the start of the programme may influence their expectations, so it may be a good idea to hold interviews as part of the selection process in order to find out what they want to achieve from their placement; and
- preparing participants thoroughly for their placement linguistically, culturally and practically.

5.9 Force Majeure

Only in exceptional circumstances will the UK National Agency recognise the cause of withdrawal as force majeure. You are advised in these cases to contact the UK National Agency as soon as possible to see if it is possible to submit a claim under one or more of the cost components within your Grant Agreement i.e. Individual Support, Linguistic Support and/or Travel.

As per page 323 of the 2019 Erasmus+ Programme Guide force majeure is defined as ‘an unforeseeable exceptional situation or event beyond the participant's control and not attributable to error or negligence on his/her part’.

If so, you must clearly explain in writing the reasons for the withdrawal/cancellation. The UK National Agency will then assess your claim and determine whether it is justified by considering:

- whether there is a genuine reason for the withdrawal;
- whether you took reasonable steps to maintain the participant's involvement in the project; and
- whether the costs are genuinely non-refundable (i.e. pre-booked accommodation).

The UK National Agency will inform you of the decision and what your next steps should be. If you are unable to demonstrate that reasonable steps were taken to avoid withdrawal, the UK National Agency reserves the right to request repayment of the corresponding part of the grant.

6. Covid-19 Specific Measures

In light of the exceptional circumstances created by the COVID-19 pandemic, the European Commission has introduced a series of flexibility measures, which are detailed below. Please also refer to the 2020 Addendum to the Grant Agreement for KA2 Strategic Partnerships. Furthermore, the Erasmus+ UK National Agency has prepared Mobility Tool+ guidance for UK HEIs on processing

mobilities impacted by Covid-19. The document can be accessed on this page of the Erasmus+ website, located under the 'Guides' tab.

Transnational Project Meetings

- When beneficiaries organise their meetings virtually, they are not entitled to receive the unit costs. The funding awarded under the Project Management and Implementation budget covers the costs related to these meetings.

Multiplier Events

- Beneficiaries should identify the attendants to the events carried out online and provide evidence for their number.
- When beneficiaries organise their meetings virtually, the grant payable per participant is 15% of the unit cost corresponding to "local participants" (i.e. 15 EUR) up to a maximum of 5.000 EUR over the lifetime of the project.
- Triggering event: The event that conditions the entitlement to the above grant is that the multiplier event has taken place and that it is of an acceptable quality level.

Supporting documents:

- 1) Proof of the activity organised virtually and name and date of the multiplier event.
- 2) Proof of the number of attendees through a declaration signed by the organiser, specifying the names of the participants, and the name and address of the sending organisation.
- 3) Any documentation used or distributed for the multiplier event.

Learning, Teaching and Training Activities

- Beneficiaries are allowed to organise their activities virtually. Where relevant, a blended mobility approach is encouraged, i.e. to start with a period of virtual mobility abroad, to be combined with a physical mobility abroad.
- In addition, the combination of virtual and physical periods must comply with the maximum duration of Learning, Teaching and Training activities as set in the 2020 Programme Guide.
- Beneficiaries shall also identify the participants to the events carried out online and provide with supporting documents evidence for their number.

Calculation of the grant amount: the grant amount takes the form of unit contribution towards individual support.

- No grant support for travel will be awarded.
- For virtual periods, the grant paid per participant is 15% of the corresponding unit costs for Individual Support.
- Where relevant, linguistic support may be provided in case of virtual activities and the same rules apply.
- The grant amount for Individual Support is calculated by multiplying the number of days/months of virtual participation per participant, by 15% of the unit contribution applicable per day/month for the type of participant and for the receiving country concerned, as specified in Annex IV of the Agreement. Travel days before or after the activity cannot be included for the calculation of the Individual Support.
- Triggering event for Individual Support: The participant is entitled to the grant once they have undertaken the activity.

- Triggering event for Linguistic Support: The participant is entitled to the grant once they have undertaken an activity exceeding 2 months, and that the person has actually undertaken language preparation in the language of instruction.

Supporting documents:

- 1) Individual Support: Proof of attendance of the activity in the form of a declaration signed by the receiving organisation specifying the name of the participant, the purpose of the activity, as well as the start and end date of the virtual activity.
- 2) Linguistic Support: Proof of attendance of courses in the form of a declaration signed by the course provider, specifying the name of the participant, the language taught, and the duration of the linguistic support.

In addition, if duly justified and documented by the beneficiary, the following funding may be claimed for:

Exceptional costs

- Costs related to buying and/or renting of equipment and/or resources necessary for the implementation of virtual and blended mobility activities can be covered through Exceptional Costs, even if no funds were initially allocated to this budget category.
- Calculation of the grant amount: the grant is a reimbursement of 75% of the eligible costs actually incurred.

Supporting documents:

- 1) Proof of payment of the cost incurred on the basis of invoices specifying the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice.

Special Needs Support

- The UK NA will also consider eligible any special needs support claimed for in order to allow the participation of those with special needs in virtual activities, under the same rules as specified in the 2020 Programme Guide.
- Budget transfers: The beneficiary is allowed to transfer funds allocated for any budget category to Special Needs Support, even if initially no funds were allocated for this category.
- Calculation of the grant amount: The grant is a reimbursement of 100% of the eligible costs actually incurred.

Supporting documents:

- 1) Invoices of the related costs, specifying the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice.

The following rules are additional to those in Articles I.2 and II.2 in Annex III and only applies to cases where virtual activities need to be organised due to COVID-19:

- Beneficiaries are allowed to transfer up to 60% of the funds allocated for Transnational Project Meetings; Multiplier Events; Learning, Teaching and Training Activities; and Exceptional Costs to any other budget category, with the exception of the budget categories Project Management and Implementation; and Exceptional Costs.

- For Exceptional Costs, beneficiaries are allowed to transfer up to 10% of the funds from any budget category based on unit contributions to Exceptional Costs in order to cover costs related to buying and/or renting of equipment and/or services necessary for the implementation of virtual mobility activities due to COVID-19, even if no funds were initially allocated to the Exceptional Costs budget category.

7. IT Tools

7.1 Mobility Tool+ (MT+)

Mobility Tool+ is the online reporting system developed by the European Commission for all Erasmus+ projects and supports beneficiaries in their Erasmus+ project management. MT+ can be accessed via <https://webgate.ec.europa.eu/eac/mobility>. In order to log in to Mobility Tool+, you need to have an [EU account](#).

It is advised to keep Mobility Tool+ up to date as your project progresses. Interim and final narrative reports will also be completed in Mobility Tool+.

The contact person and legal representative for your organisation and partner organisations automatically have access to Mobility Tool+ using the email address we have detailed for them in our database. You will be able to log in once you have registered an 'EU Login' account that is linked to your email address. Once logged in, you can then add additional contacts to assist with the reporting of the Erasmus+ project. In Mobility Tool+ your organisation should have access to its own reporting environment and is able to fill information in about conducted activities and related unit costs / real costs.

For more guidance on the tool please read the [MT+ Guidance for Beneficiaries](#).

7.2 Organisation Registration System (ORS)

The [Organisation Registration System](#) is your entry point for the electronic administration of EU-funded projects under the programmes, such as Erasmus+. It is open to beneficiaries managing their EU grants to view and edit their organisational data, such as bank details or LEAR (Legal Entity Appointed Representative). A LEAR can, for example, be an administrative staff with access/rights to keep the Organisation Registration up to date, so please do not mistake this with the Legal Representative.

The 8-digit OID, which is prefixed with an E, is obtained and managed through the Organisation Registration System. When the contact person leaves the organisation without appointing another person, the access to update the OID is lost. An organisation can always request a password reset; however, this only works when the person forgets the password. If the person left the organisation, in most cases, the organisation does not have access to the email address any longer so a password reset will not help. Therefore, it is recommended for each organisation to have at least two people with access to OID to ensure there is a backup.

For more information please visit the Organisation Registration System [here](#)

7.3 Project Results Platform (PRP)

Dissemination and exploitation of results are crucial areas of the Erasmus+ project lifecycle. They give participating organisations the opportunity to communicate and share outcomes and deliverables, thus extending the impact of their projects, improving their sustainability and justifying the European added value of Erasmus+. In order to successfully disseminate and exploit project results, organisations involved in Erasmus+ projects are asked to give the necessary thought to dissemination and exploitation activities when designing and implementing their project. The level and intensity of such activities should be proportional to the objectives, the scope and the targets of the different Actions of Erasmus+.

Please note: Key Action 203 beneficiaries are contractually required to upload all their project results to the project results platform.

The approval of the final report will be subject to the upload of the Project deliverables to the Erasmus+ Project Results Platform by the time of its submission.

8. Budget management

8.1 Unit Costs and Actual Costs

While your project has been awarded a ‘maximum grant amount’, this does not necessarily mean that the project will be entitled to receive this full sum. Erasmus+ grants are made up of a combination of unit costs and real costs. Your project will only be eligible for Unit costs and Actual costs for activities that are realised. Annex III Financial and Contractual Rules of your grant agreement details each budget category as per below:

A. Calculation of the Grant Amount

This information details how costs for each budget categories are calculated.

B. Triggering Event

This part details the event that needs to take place for your project to be eligible for each cost. E.g. Transnational Project Meetings: To claim the unit cost for a participant, the participant must actually travel and complete the mobility and attend the meeting as approved by the UK National Agency. If the triggering event is not realised, the project would not be eligible for the Transnational Project Meeting unit costs for this participant. The Transnational Project Meeting cost for the participant who did not travel will be removed from the overall project grant budget (unless transferred using the budget category transfer rule either by deduction from the final grant payment, or recovery by way of invoice.

C. Supporting Documents

This part details the supporting documents required for each budget category and what information needs to be kept as evidence to show that the triggering event actually happened e.g. Transnational

Project Meetings: you are required to keep and retain a certificate of attendance per participant as a minimum.

D. Reporting

This details the information you will be required to input into Mobility Tool+. For more information please refer to Article 8 of this Handbook.

8.2 Unit Costs: The use of lump sums, the reimbursement on the basis of unit costs and flat-rate financing

Projects are entitled to the unit cost flat rates, provided that a triggering event happens and supporting documentation is retained as evidence. Projects are still entitled to full unit costs (flat rate) even if the 'real' expenditure is less. E.g. A project is awarded €575 for one person to travel to a Transnational Project Meeting (distance band 100 and 1999KM). The participant travels and attends the transnational project meeting as planned. The project retains the required supporting documentation e.g. certificate of attendance as evidence that the triggering event happened. Even if the participant actual expenditure is only €500, the project would still be entitled to the full €575-unit costs for attendance to the Transnational Project Meeting. Please see the below example:

Amount **spent** by participant to attend transnational project meeting

	Flight Tickets: €100
	Subsistence: €100
	Local Travel: €50
	Insurance: €20
	Hotel: €230
Actual Expenditure Total = €500	

Amount project can **claim** for participant involvement in transnational project meeting

Distance Band 100 - 1999. Distance established using [Distance Band Calculator](#)

Contribution to unit costs	For travel distances between 100 and 1999KM:
	575 EUR per participant per meeting
	For travel distances of 2000 KM or more:
	760 EUR per participant per meeting

Supporting documentation retained as evidence and submitted with final report.

Unit Cost the project is eligible to claim = €575

Actual Expenditure: €500

Surplus = €75

The left over €75 would be seen as **surplus**. You do not need to transfer this surplus as your project will still be entitled to the full flat rate. In the spirit of the Erasmus+ Programme this surplus should be used to further strengthen the quality of your Erasmus+ project. This principle does not work for budget categories based on Actual costs as we only fund these according to actual expenditure.

Budget Category	Cost Type
Project Management and Implementation	Unit Cost
Transnational Project Meetings	Unit Cost
Intellectual Outputs	Unit Cost
Multiplier Events	Unit Cost
Travel	Unit Cost
Individual Support	Unit Cost
Linguistic Support	Unit Cost
Special Needs Support	Actual Cost
Exceptional Costs	Actual Cost

8.3 Actual Costs

The two budget categories special needs support and exceptional costs are based on the principle of actual costs. 100% of eligible costs under special needs support will be reimbursed (up to the budget category amount awarded), on the condition that invoices and receipts are provided. 75% of eligible costs under exceptional costs will be reimbursed, provided that this does not exceed the budget category amount awarded by the UK National Agency. **Please note that receipts and invoices are required as evidence for real cost expenditure.**

8.4 Budget Transfers

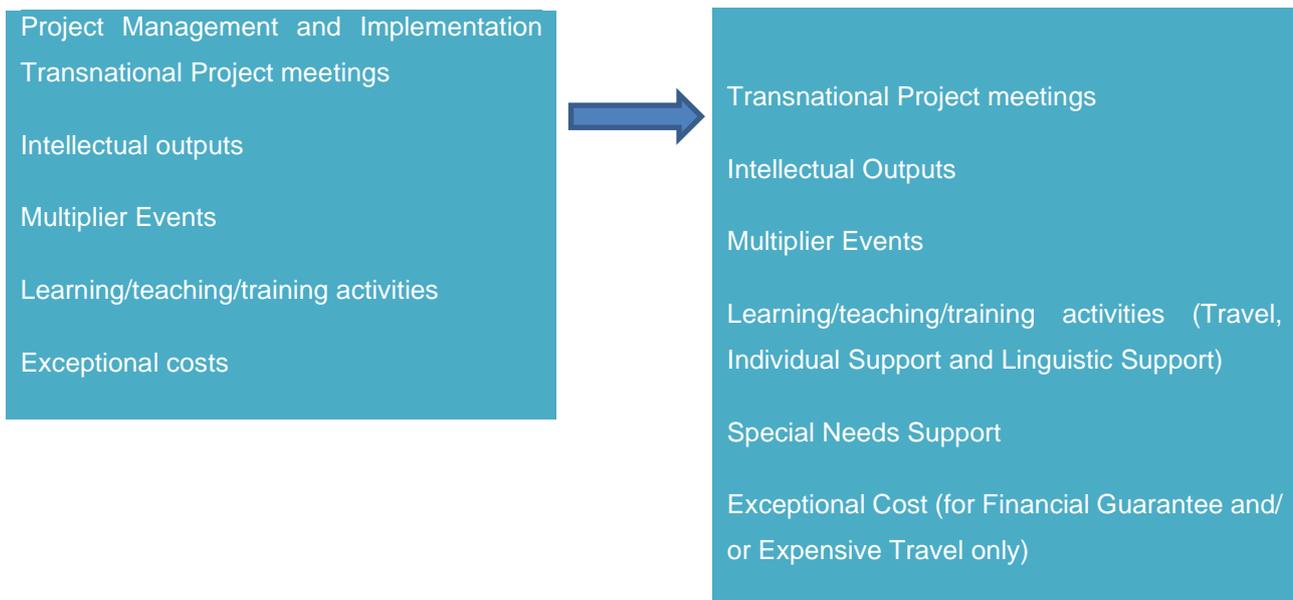
As per Article 1.3.3 of your Grant Agreement there is some flexibility regarding transferring funds between the different budget categories, without submitting a formal contract amendment request to the UK National Agency for approval.

Important Note: Please read the information in this section and the information in your Grant Agreement (Annex I 1.3.3) in its entirety and contact us as soon as possible if you have any questions regarding the principle of budget category transfers. It is highly recommended to update Mobility Tool+ as your project progresses. This will assist you with managing your budget, keeping track of the unit costs you are eligible to claim for and managing budget category transfers.

It is important to understand that triggering events are needed for a project to be eligible for the associated costs. It is also important to understand that any surplus does not need to be transferred between different budget categories.

Below you can see a diagram which demonstrates which budget categories money can be transferred from and to. Please note, the principles of triggering events and supporting documentation still stands after budget category transfers have taken place.

As stated in your Grant Agreement, the beneficiary is allowed to transfer funds between the different budget categories resulting in a change of the estimated budget and the related activities described in Annex II of the Grant Agreement, without requesting an amendment of the Agreement as specified in Article 1.3.3 of the Grant Agreement, under the conditions that the Project is implemented in accordance with the approved project application and overall objectives described in Annex II, and the following rules are respected:



You cannot transfer to these two categories:



Unit Costs

- You cannot decrease a budget category by more than 20%;
- You cannot increase a budget category by more than 20%;
- You cannot transfer money to the Project Management and Implementation category

Actual Costs

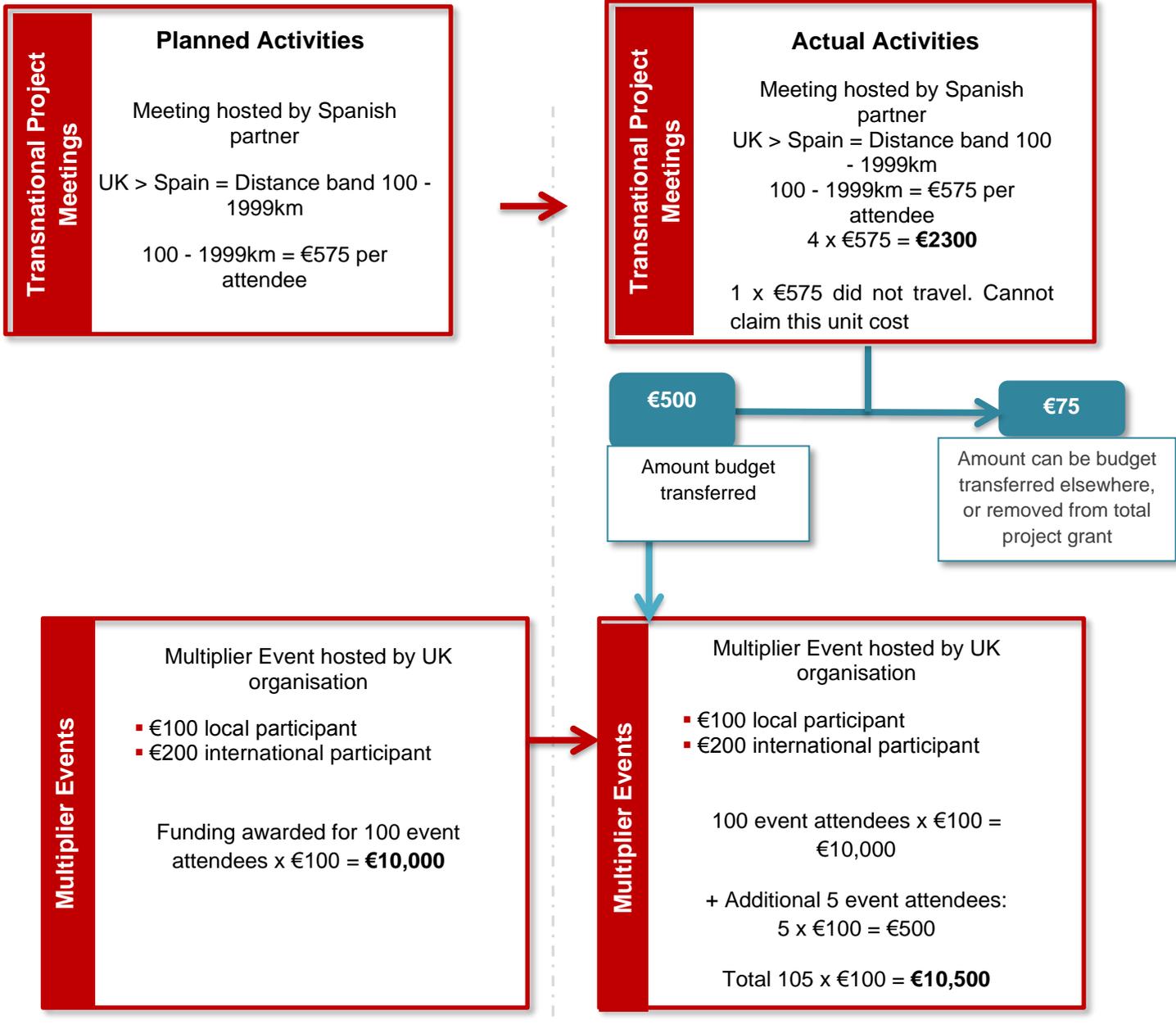
- You can ONLY transfer to Exceptional Costs under Financial Guarantee* or Expensive Travel costs, in so far as required by the UK NA in Article I.4.2 even if no funds are allocated for Exceptional Costs as specified in Annex II. In this instance the 20% cap for increasing the Exceptional Costs category does not apply.

*(*If the financial capacity is not considered satisfactory, the National or Executive Agency may require any beneficiary which has been awarded a grant exceeding 60 000 EUR to lodge a guarantee in advance in order to limit the financial risks connected with the pre-financing payment. This guarantee can be requested for up to the same amount of the pre-financing payment(s). 2019 Erasmus+ Programme Guide, page 267)*

- You cannot transfer money from the Special Needs support budget category but there is an exception that you can transfer to this category even if no money was originally granted for special needs support. Please note; the 20% transfer cap does not apply to the Special Needs category.

For a better understanding of possible budget transfers, you can check the budget structure of your project in Mobility Tool+.

If there is a transfer from budget category A to category B, then the relevant triggering events are those governing the budget for Category B. The transfer happens before the triggering event, not after. So, for example, if you are granted a unit cost for Transnational Project Meetings but want to use this cost for a Multiplier Event, additional event attendees would attend the Multiplier Event and they would be reported on Mobility Tool+. It is important however that the difference between the contracted and the reported amounts does not exceed the transfer flexibility defined within your Grant Agreement. The incurred costs must respect the eligibility criteria for the budget category in which they are reported. Please see example below:



Adding activity information into Mobility Tool+ (see screenshot below) can assist you in tracking how much budget your project is entitled to as it progresses. You can see that there are columns which help manage any budget category transfers.

	Budget Transfers (% of Approved Budget)					Current Budget (in Mobility Tool)	% Current/Approved budget
	Minimum Allowed After Transfers To Another Budget Item		Maximum Allowed After Transfers From Another Budget Item				
	Approved Budget (by National Agency)	% of Approved Budget	Minimum Amount According to % of Approved Budget	% of Approved Budget	Maximum Amount According to % of Approved Budget		
Total Project	33,560.00 €					32,410.00 €	0.00 %
Reduction of EU Grant						0	
Project management and implementation	6,000.00 €	80.00 %	4,800.00 €	100.00 %	6,000.00 €	6,000.00 €	100.00 %
Transnational Project Meetings	8,010.00 €	80.00 %	6,408.00 €	120.00 %	9,612.00 €	6,860.00 €	85.64 %
Intellectual Outputs	0.00 €	80.00 %	0.00 €	120.00 %	0.00 €	0.00 €	0.00 %
Multiplier Events	0.00 €	80.00 %	0.00 €	120.00 %	0.00 €	0.00 €	0.00 %

9. Project Activities

9.1 Project Management and Implementation 'PMI' (unit cost)

Eligible costs under this budget category include staff costs for general project management (e.g. planning, finances, coordination and communication between partners, etc.); small scale learning/teaching/training materials, tools, approaches etc. Other eligible costs could include virtual cooperation and local project activities (e.g. class-room project work with learners, organisation and mentoring of embedded learning/training activities, etc.); information, promotion and dissemination (e.g. brochures, leaflets, web information, etc.); general project management and administrative tasks (including staff time for these tasks) should be covered under Project Management and Implementation rather than the Intellectual Outputs budget.

The grant amount for Project Management and Implementation is calculated by multiplying the total number of months of the project duration by the unit contribution applicable to the beneficiary. The beneficiaries must agree on the distribution of the amount between them depending on their respective workload and contribution to the project activities and results.

Triggering event: implementation of the project activities and production of project outputs.

Supporting documents: proof of activities undertaken, and outputs produced will need to be detailed in the final report. Evidence of outputs must also be uploaded by the coordinator in the Erasmus+ Project Results Platform and should be kept safe and ready to be produced in the case of an audit.

Applicable rates:

Contribution to the activities of the coordinating organisation: 500 EUR per month
Contribution to the activities of the other participating organisations: 250 EUR per partner organisation per month
Maximum amount in the case of 10 or more beneficiaries: 2750 EUR per month for the project as a whole

9.2 Transnational Project Meetings 'TPM' (unit cost)

Transnational project meetings are for project implementation and coordination purposes. Transnational Project Meetings should not be confused with Learning, Teaching, and Training activities. As per Annex III of your agreement, the venue for Transnational Project Meetings should be held and hosted in the country of one of the project partners. Transnational Project Meetings can also be held at the seat of an institution of the European Union (Brussels, Frankfurt, Luxembourg, Strasbourg, and The Hague). Travel costs for this budget category will be calculated using the Distance Band Calculator. For meeting costs to be eligible under the Transnational Project Meetings budget heading, activities must involve participants from partner organisations from at least two different Programme Countries. When the travel distance for Transnational Project Meetings is less than 100km, it is not possible to claim unit costs.

The grant amount is calculated by multiplying the total number of participants by the unit contribution applicable.

Triggering event: The reported participant actually participates in a TPM.

Supporting documents:

- Travel: Proof of attendance, e.g. a registration list, signed by the receiving organisation specifying the name of the participant, the purpose of the activity, as well as its starting and end date;
- In the case of a distance band being changed, e.g. because travel has taken place from a different place from where the sending organisation is located, the actual travel itinerary must be supported with tickets to prove where the participant(s) departed and arrived from.
- Proof of who attended the transnational project meeting in the form of a registration sheet which should include the name, date and place of the meeting signed by the receiving organisation, names and signatures of participants and name, address and signature of the sending organisation.
- Detailed agenda and documents used or distributed at the transnational project meeting.

Applicable rates:

For travel distances between 100 and 1999KM: 575 EUR per participant per meeting

For travel distances of 2000 KM or more: **760 EUR** per participant per meeting

Nota bene: the "travel distance" represents the distance between the place of origin and the venue, whereas the "amount" covers the contribution to travel, both to and from the venue.

9.3 Intellectual Outputs (unit cost)

Your project will have been awarded a budget to produce Intellectual Outputs. These are tangible deliverables of the project (such as curricula, open educational resources, IT tools, analyses, studies, peer-learning methods, etc.) Any approved Intellectual Outputs will be listed in Annex II of your Grant Agreement and the associated costs are outlined in Annex III. Please note costs associated with Managers and Administrative staff members should be covered under your Project Management and Implementation budget. You will only be able to claim staff costs associated with Managers or Administrators against Intellectual Outputs if this is specified and approved in Annex II of your Grant Agreement.

To be classed as a member of staff, individuals must be employed by your organisation either on a professional or a voluntary basis. In order for costs to be eligible, partners need to be able to demonstrate a formal link (on a professional or voluntary basis) with the person(s) which staff costs are being claimed for. To demonstrate this formal link, you need to keep proof of the nature of the relationship (e.g. employment contracts or volunteer agreements). Please note that people working for the organisation on the basis of a service contract (e.g. translators, web designers, etc.) are not considered as staff of the organisation. Therefore, their staff time cannot be claimed under Intellectual Outputs. Staff costs incurred by individuals external to the partner organisations belong under the Exceptional Costs budget category and should only be claimed if included and approved in the project's budget.

The grant amount is calculated by multiplying the number of days of work performed by the staff of the beneficiaries by the unit contribution applicable per day for the category of staff for the country in which the beneficiary concerned is established. It doesn't relate to the professional profile of the person, but to the function performed by the person in relation to the development of the IO.

Note: Beneficiaries must not subcontract any activities funded from the budget category Intellectual Outputs.

Triggering event: the Intellectual Output of an acceptable quality level has been produced.

At reporting stage, you will need to report on Mobility Tool+ the number of days of work for each Intellectual Output per staff category for each partner. As per Annex III of the grant agreement proof of staff time in the form of timesheets will need to be kept and should state the staff members name, the category of staff, the dates and the total number days of work the person has contributed to the Intellectual Output.

Supporting documents:

- Proof of the Intellectual Output produced, which must be uploaded to the Erasmus+ Project Results Platform and/or, depending on its nature, available for checks and audits at the premises of the beneficiaries.
- Time sheet per member of staff to show the total days of work spent producing the Intellectual Outputs which should identify the name, the category of staff in terms of the 4 categories specified in Annex IV and the dates.
- Proof of the nature of the relationship with the beneficiary (such as type of employment contract, voluntary work, SME ownership, etc.) as registered in the official records of the beneficiary. Beneficiaries must be able to demonstrate the formal link with the person concerned, whether he/she is involved in the Project on a professional or voluntary basis. Persons working for a beneficiary on the basis of a service contract (e.g. translators, web designer etc.) are not considered as staff. Therefore, their working time cannot be claimed under “Intellectual Outputs” but could be eligible under “Exceptional Costs” under the conditions specified in the related section below.

Applicable rates:

Programme Countries	Manager	Teacher / Trainer / Researcher / Youth worker	Technician	Administrative staff
	Amount per day in EUR			
Denmark, Ireland, Luxembourg, Netherlands, Austria, Sweden, Liechtenstein, Norway	294	241	190	157
Belgium, Germany, France, Italy, Finland, United Kingdom, Iceland	280	214	162	131
Czech Republic, Greece, Spain, Cyprus, Malta, Portugal, Slovenia	164	137	102	78
Bulgaria, Estonia, Croatia, Latvia, Lithuania, Hungary, Poland, Romania, Serbia, Slovakia, North Macedonia, Turkey	88	74	55	39

Partner Countries	Manager	Teacher / Trainer / Researcher / Youth worker	Technician	Administrative staff
	Amount per day in EUR			
Australia, Canada, Kuwait, Macao, Monaco, Qatar, San Marino, Switzerland, United States of America	294	241	190	157
Andorra, Brunei, Japan, New Zealand, Singapore, United Arab Emirates, Vatican City State	280	214	162	131
Bahamas, Bahrain, Equatorial Guinea, Hong Kong, Israel, Korea (Republic of), Oman, Saudi Arabia, Taiwan	164	137	102	78
Afghanistan, Albania, Algeria, Angola, Antigua and Barbuda, Argentina, Armenia, Azerbaijan,	88	74	55	39

<p>Bangladesh, Barbados, Chile, Belarus, Belize, Benin, Bhutan, Bolivia, Bosnia and Herzegovina, Botswana, Brazil, Burkina Faso, Burundi, Cambodia, Cameroon, Cape Verde, Central African Republic, Chad, China, Colombia, Comoros, Congo (Brazzaville), Congo (Kinshasa), Cook Islands, Costa Rica, Cuba, Djibouti, Dominica, Dominican Republic, East Timor, Ecuador, Egypt, El Salvador, Eritrea, Ethiopia, Fiji, Gabon, Gambia, Georgia, Ghana, Grenada, Guatemala, Guinea (Republic of), Guinea-Bissau, Guyana, Haiti, Honduras, India, Indonesia, Iran, Iraq, Republic of Côte d'Ivoire, Jamaica, Jordan, Kazakhstan, Kenya, Kiribati, Korea (DPR), Kosovo, Kyrgyzstan, Laos, Lebanon, Lesotho, Liberia, Libya, Madagascar, Malawi, Malaysia, Maldives, Mali, Marshall Islands, Mauritania, Mauritius, Mexico, Micronesia, Moldova, Mongolia, Montenegro, Morocco, Mozambique, Myanmar, Namibia, Nauru, Nepal, Nicaragua, Niger, Nigeria, Niue, Pakistan, Palau, Palestine, Panama, Papua New Guinea, Paraguay, Peru, Philippines, Russian Federation, Rwanda, Samoa, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Solomon Islands, Somalia, South Africa, Sri Lanka, St. Lucia, St. Vincent and the Grenadines, St. Kitts and Nevis, Sudan, Suriname, Swaziland, Syria, Tajikistan, Tanzania, Thailand, Togo, Tonga, Trinidad and Tobago, Tunisia, Turkmenistan, Tuvalu, Uganda, Ukraine, Uruguay, Uzbekistan, Vanuatu, Venezuela, Vietnam, Yemen, Zambia, Zimbabwe</p>				
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9.4 Multiplier Events (unit cost)

Multiplier Events are national and transnational conferences (only if hosted by a partner and are relevant to disseminating the project), seminars, events for sharing and disseminating the Intellectual Outputs realised by the project (excluding costs for travel and subsistence of representatives of participating organisations involved in the project). Support for Multiplier Events is provided only if in direct relation to the Intellectual Outputs of the project. As per Annex III of the grant agreement proof of attendance in the form of a participants list (with name, date, place of the Multiplier Event and the name and address of the sending organisation) signed by participants is required.

The grant amount is calculated by multiplying the number of participants from organisations other than the beneficiary, the associated partners hosting a Multiplier Event and other project partners.

Triggering event: The Multiplier Event in question has taken place.

At reporting stage, the coordinator must report on the description of the Multiplier Events, the Intellectual Outputs covered, the leading and participating organisations, the venue of the meeting and the numbers of local and international participants.

Supporting documents:

- Proof of attendance at the Multiplier Event in the form of a participants list signed by the receiving organisation which should specify:
name, date and place of the event
names and signatures of the participants
name and address of the participants sending organisation (if applicable)
- Detailed agenda and any documents used or distributed at the Multiplier Event.

Applicable rates:

100 EUR per local participant (i.e. participants from the country where the event is taking place)
200 EUR per international participant (i.e. participants from other countries)
Maximum 30 000 EUR for the project as a whole

9.5 Learning Teaching, Training Activities (unit cost)

Learning, Teaching, Training activities for staff and students should have been applied for at the application stage. Full information about Learning, Teaching, Training Activities can be found in Annex I 'Specific rules and information relating to Strategic Partnerships in the field of Higher Education' on pages 271 - 277 of the 2019 Erasmus+ Programme Guide.

Important Note: As a reminder, cultural tourism activities will not be accepted as Learning, Teaching, Training activities.

Learning, Teaching, Training activities are split into three budget categories:

- A. Travel,
- B. Individual Support
- C. Linguistic Support

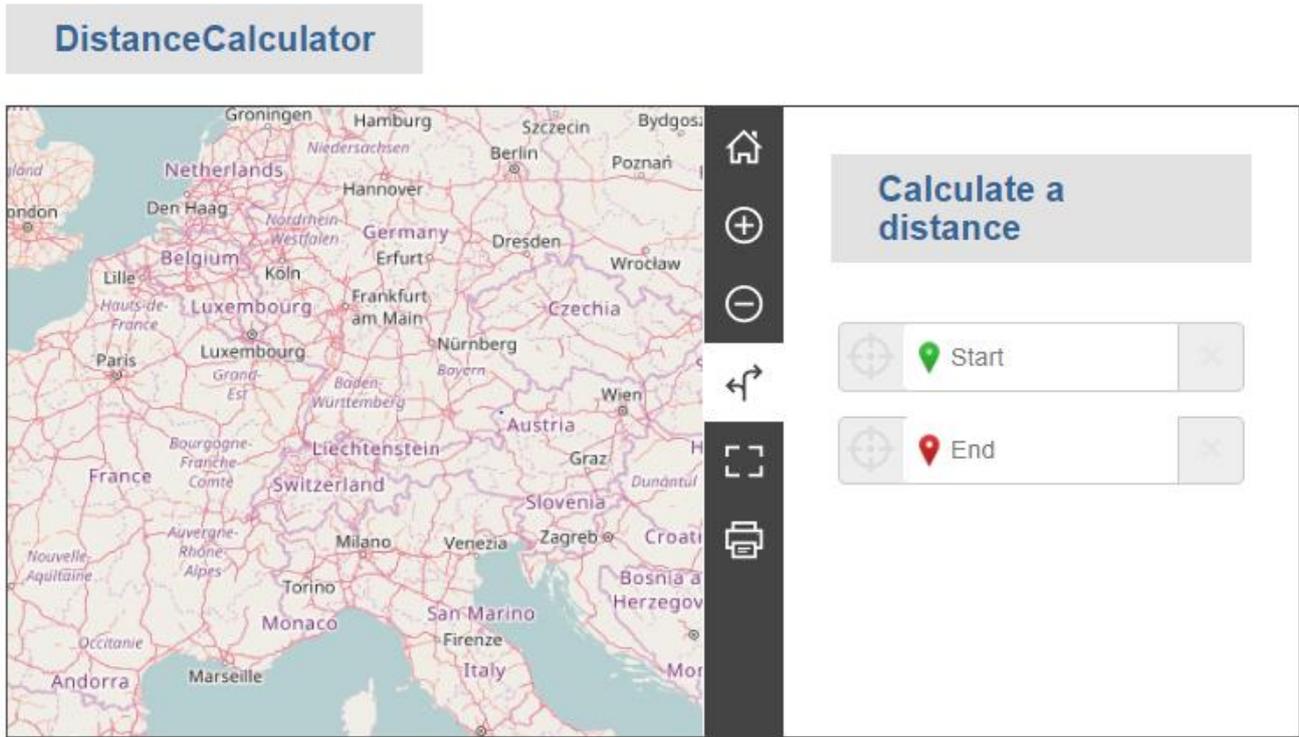
Please be aware of the minimum and maximum durations for activities as stated in the table below, all durations below exclude travel days.

Type of activity	Duration
Blended Mobility of learners	5 days to 2 months of Physical Mobility
Intensive Study Programmes	5 days to 2 months (learners) 1 day to 2 months (teaching staff)
Long-term Teaching or Training Assignments	2 months to 12 months

Short-term joint staff training events	3 days to 2 months
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A. Travel (unit cost)

Travel is a contribution to the travel costs of participants including accompanying persons from their place of origin to the venue of the activity and return. This budget category is based on the distance travelled per participant and is defined as the cost of the entire journey from the UK point of origin to the host destination (and return), including transfers. Travel distances are always calculated using the [Distance Calculator](#) supported by the European Commission. Using the calculator, you must indicate the distance of one-way travel to calculate the total amount of EU grant that will support the round trip as shown below.



Leaflet | © OpenStreetMap contributors | Disclaimer

Travel is calculated according to rates produced by the European Commission. This will be automatically calculated for you on Mobility Tool+, after you have selected the distance band. Using Mobility Tool+ to add participant data in the Learning, Teaching, and Training Activities tab is a great way to establish how much money each participant is entitled to for travel, by selecting the relevant distance band.

When claiming travel costs, you will need to report the number of participants in each activity on Mobility Tool+, the dates of the activity and enter the appropriate unit cost on the basis of the one-way distance obtained from the European Commission’s online [distance calculator](#). Mobility Tool+ will calculate the grant amount automatically.

Applicable rates:

Travel distances	Amount
Between 10 and 99 KM	20 EUR per participant
Between 100 and 499 KM	180 EUR per participant
Between 500 and 1999 KM	275 EUR per participant
Between 2000 and 2999 KM	360 EUR per participant
Between 3000 and 3999 KM	530 EUR per participant
Between 4000 and 7999 KM	820 EUR per participant
8000 KM or more	1500 EUR per participant

Nota bene: the "travel distance" represents the distance between the place of origin and the venue, whereas the "amount" covers the contribution to the travel both to and from the venue.

9.6 Expensive Travel Costs of Participants

As stated in page 121 of the 2019 programme guide, applicants will be allowed to claim financial support for expensive travel costs under the heading "exceptional costs" (up to a maximum of 80% of total eligible costs). This would be allowed provided that applicants can justify that the standard funding rules (based on unit costs per travel distance band) do not cover at least 70% of the travel costs of participants. If awarded the exceptional costs for expensive travel replace the standard travel grant.

Exceptional Costs	Expensive travel costs of participants, (for details, see section "what else you should know about this action").	Real Costs	Expensive travel costs: maximum up to 80% of eligible costs	Conditional: the request for financial support to cover exceptional costs must be motivated in the application form
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B. Individual Support

As per Annex III of the grant agreement, Individual Support is calculated by multiplying the number of days/months per participant by the unit cost applicable per day/month for the type of participant and for the receiving country concerned. Individual Support is a contribution towards the costs of accommodation, insurance, food, and local travel to and from the placement within the host country.

This component of expenditure is paid as a lump sum and all Individual Support must be spent on the participant(s). Please note that participants are only eligible for unit costs per day for the days that they engage in mobility activity.

Details of each participant will have to be input onto Mobility Tool+.

Short-term activities

<p>Short-term joint staff training events</p> <p>Teachers in Intensive Study Programmes</p> <p>Accompanying persons</p>	<p>up to the 14th day of activity: 106 EUR per day per participant</p> <p>+</p> <p>between the 15th and 60th day of activity: 74 EUR per day per participant</p>
<p>Short-term exchanges of groups of pupils</p> <p>Blended mobility of pupils, learners and young people</p> <p>Learners in Intensive Study Programmes</p>	<p>up to the 14th day of activity: 58 EUR per day per participant</p> <p>+</p> <p>between the 15th and 60th day of activity: 42 EUR per day per participant</p>

Long-term activities

<p>Long-term teaching or training assignments</p> <p>Long term mobility of youth workers</p>	<p>up to the 14th day of activity: B1.5 per day per participant</p> <p>+</p> <p>between the 15th and 60th day of activity: B1.6 per day per participant</p> <p>+</p> <p>between the 61th day of activity and up to 12 months: B1.7 per day per participant</p>
<p>Long-term mobility of pupils</p>	<p>B1.8 per month per participant</p>

Programme Countries	Long-term teaching or training assignments / mobility of youth workers (in EUR per day)			Long-term activities of pupils (in EUR per month)
	B1.5	B1.6	B1.7	B1.8
Group 1:	125	88	63	168

Norway, Denmark, Luxembourg, United Kingdom, Iceland, Sweden, Ireland, Finland, Liechtenstein				
Group 2: Netherlands, Austria, Belgium, France, Germany, Italy, Spain, Cyprus, Greece, Malta, Portugal	110	77	55	147
Group 3: Slovenia, Estonia, Latvia, Croatia, Slovakia, Czech Republic, Lithuania, Turkey, Hungary, Poland, Romania, Bulgaria, North Macedonia, Serbia	90	63	45	105

C. Linguistic Support

Linguistic Support is a contribution to the costs linked to the support offered to participants in order to improve the knowledge of the language of instruction or work. This would only apply for those mobilities that last between 2 and 12 months. On Mobility Tool+, you will need to report which participants received Linguistic Support. You will need to retain supporting documents in the form of proof of attendance to any language courses, invoices for the purchase of learning materials or a declaration signed by the participant, if the partner organisations delivered the Linguistic Support themselves. Please refer to your Grant Agreement for further details. This budget category may only apply to a small number of projects.

Applicable rates: 150 EUR per participant (applies for long-term activities only)

9.7 Special Needs Support (actual cost)

Special Needs Support is the budget category to help fund the additional costs directly related to participants with disabilities and accompanying persons (including costs related to travel and subsistence, if justified and as long as a grant for these participants is not requested through budget categories 'Travel' and 'Individual Support').

Where costs have been incurred for participant(s) with specific needs, you will need to report the actual costs in Mobility Tool+. You will also need to indicate whether you have been granted this funding, or if it is a budget transfer, detail the type and total cost being claimed. At final reporting stage you will be required to provide invoices of the actual costs incurred, giving the name and address of the company issuing the invoice, as well as the amount, currency and date.

9.8 Exceptional Costs (actual cost)

If detailed under Annex II of your grant agreement, any grant awarded under Exceptional Costs can be used as specified in your approved budget. Examples might include subcontracting requirements and costs related to the depreciation of equipment, but please check your specific agreement. For

Exceptional Costs, you need to report the actual costs incurred in Mobility Tool+. The UK National Agency will reimburse 75% of the eligible costs actually incurred or €50,000, whichever is the lowest.

10. Reporting

The HEI must show that reported activities have taken place but it is not required to show details of each item of expenditure except in the instance of special needs support and exceptional costs.

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

10.1 Interim report

All Key action 2 projects are required to submit an “Interim Report” during the lifetime of their project you can find the date this is required in Article I.4.3 of your grant agreement.

For this report you would need to ensure that all activities that have taken place are recorded on Mobility Tool+.

Interim Report Outcome

In so far as an interim report is required and that the interim report demonstrates that at least 70% of the amount of first pre-financing payment has been used, the interim report is considered as a request for a further pre-financing payment. The total of the further pre-financing payment corresponds to 40% of the maximum amount listed in Article I.3.1. of the Grant Agreement.

Where the interim report shows that less than 70% of the previous pre-financing payment(s) has been used to cover costs of the project, a further interim report must be submitted once at least 70% of the amount of the first pre-financing payment has been used, which must be considered as a request for further pre-financing payment. The total of the further pre-financing payment corresponds to 40% of the maximum amount listed in Article I.3.1. of the Grant Agreement.

Where the second interim report shows that the beneficiary will not be able to use the maximum grant amount as specified in Article I.3.1 within the contractual period defined in Article I.2.2, the NA will issue an amendment reducing the maximum grant amount accordingly and, in case the reduced maximum grant amount is less than the amount of pre-financing transferred to the coordinator until that date, recover the excess amount of pre-financing from the coordinator in accordance with Article II.26.

Please note that all reports can only be submitted via Mobility Tool+.

Please note; you can access the interim report on Mobility Tool+ under the ‘Reports’ section. Only one person can edit the report at any given time. In order for other contacts on the programme to make changes to the report you would have to click ‘Release Draft’, contacts should then be able to see the green ‘Edit Draft’ tab as shown in the screenshot.

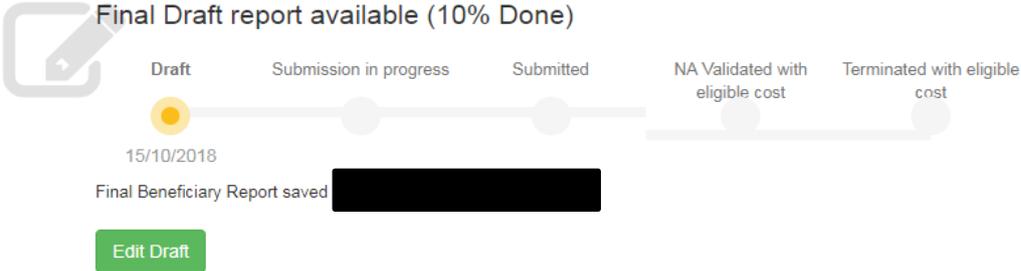
Transnational Project Meetings | Intellectual Outputs | Multiplier Events | Learning, Teaching and Training Activities | Special Costs | Budget | **Reports**

Beneficiary Reports

Interim/Progress Report (1) | **Final Beneficiary Report (1)**

Final Beneficiary Report

Final Draft report available (10% Done)



15/10/2018
Final Beneficiary Report saved [REDACTED]

[Edit Draft](#)

10.2 Final Report

All HEIs are required to submit a final report via Mobility Tool+ at the end of every project, and, upload all project results in the Erasmus+ Project Results Platform. 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 I.2.2 of the grant agreement).** Mobility Tool+ remains fully open during the reporting period, however, no changes to project records in MT+ will be possible past the final report deadline. Lead organisations must enter activity and budget information about their project in Mobility Tool+ as the project progresses. Organisations can then begin completing the narrative report. **Please note: Final reports should not be submitted before the project end date.**

Organisations are required to submit the final report on Mobility Tool+ and on time in order for the final payment to be paid (upon successful assessment of the final report), i.e. the final report is considered as request for payment of the balance of the grant.

Important note: Please ensure that you update your project summary. This is pre-populated from the application form and is therefore in the future tense. The project summary should describe what you have done in the project rather than what you plan to do.

Failure to report or report correctly may result in some or all Erasmus+ funding being withdrawn and a request for recovery being issued.

Once a project final report has been submitted, it will be assessed by expert external assessors. You will then receive final report feedback and score. The final report will be assessed on the basis of quality criteria and scored out of a maximum total of 100 points. If the final report scores less than

50 points in total, the UK National Agency will reduce the final grant amount on the basis of poor, partial or late implementation of the project in accordance with Annex III of your Grant Agreement.

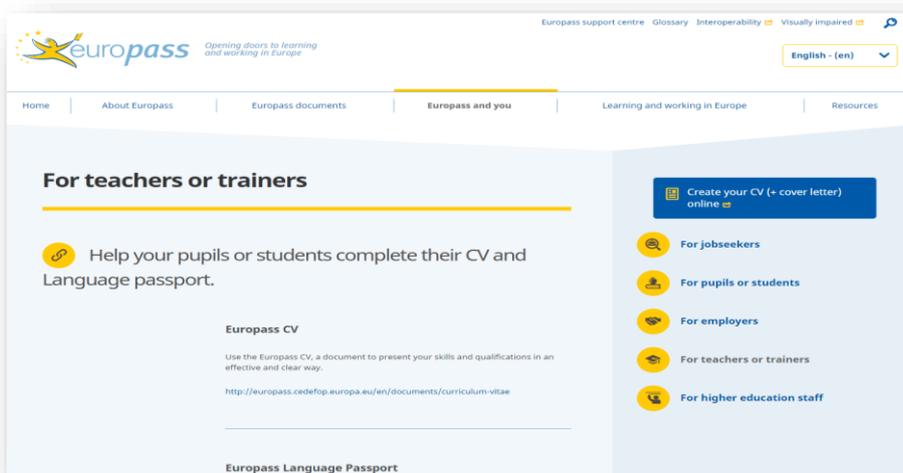
The payment of the balance reimburses or covers the remaining part of the eligible costs incurred by the beneficiaries for the implementation of the project. If the total amount of earlier payments is greater than the final amount of the grant, the payment of the balance takes the form of a recovery. If the total amount of earlier payments is lower than the final amount of the grant, the NA will pay the balance within 60 calendar days.

11. Validation

It is important that all Learning, Teaching and Training Activities (transnational and domestic) are either formally or informally validated. Accreditation through a course of study is a favourable form of validation but other less formal methods are acceptable. Other acceptable methods include Certificates of Achievement created by the host or beneficiary organisations. Formal forms of validation are as below and should be utilised where possible:

11.1 Europass

The UK National Agency recommends that all projects use Europass to validate the participants time on placement. Europass is a European wide initiative which aims to help individuals to present and document their skills and qualifications in a clear and transparent way throughout Europe. Europass consists of five documents, which enables potential employers to understand which subject has been studied, what training has been completed and how much experience has been gained. For further information regarding Europass visit the [website](#).



11.2 Continuous Professional Development (CPD)

For staff, it is recommended that placements are validated as part of their Continuous Professional Development (CPD) plan within their home organisation.

11.3 Language Validation

The portfolio of Europass documents includes the Europass Language Passport, this is a way of validating the skills gained on placement as well as adding information about other language training (either formal or informal) an individual may have received.

12. Impact and Dissemination

Dissemination and exploitation of results is one of the crucial areas of the Erasmus+ Programme. You can find specific information about Dissemination in Annex II Dissemination and Exploitation of results - A Practical Guide for Beneficiaries on pages 314 - 319 of the [2019 Programme Guide](#).

Tangible impact and results may include:

- an approach or a model to solve a problem;
- a practical tool or product such as handbooks, curricula, e-learning tools;
- research reports or studies;
- good practice guides or case studies;
- recognition certificates;
- evaluation reports;
- Newsletters or information leaflets.

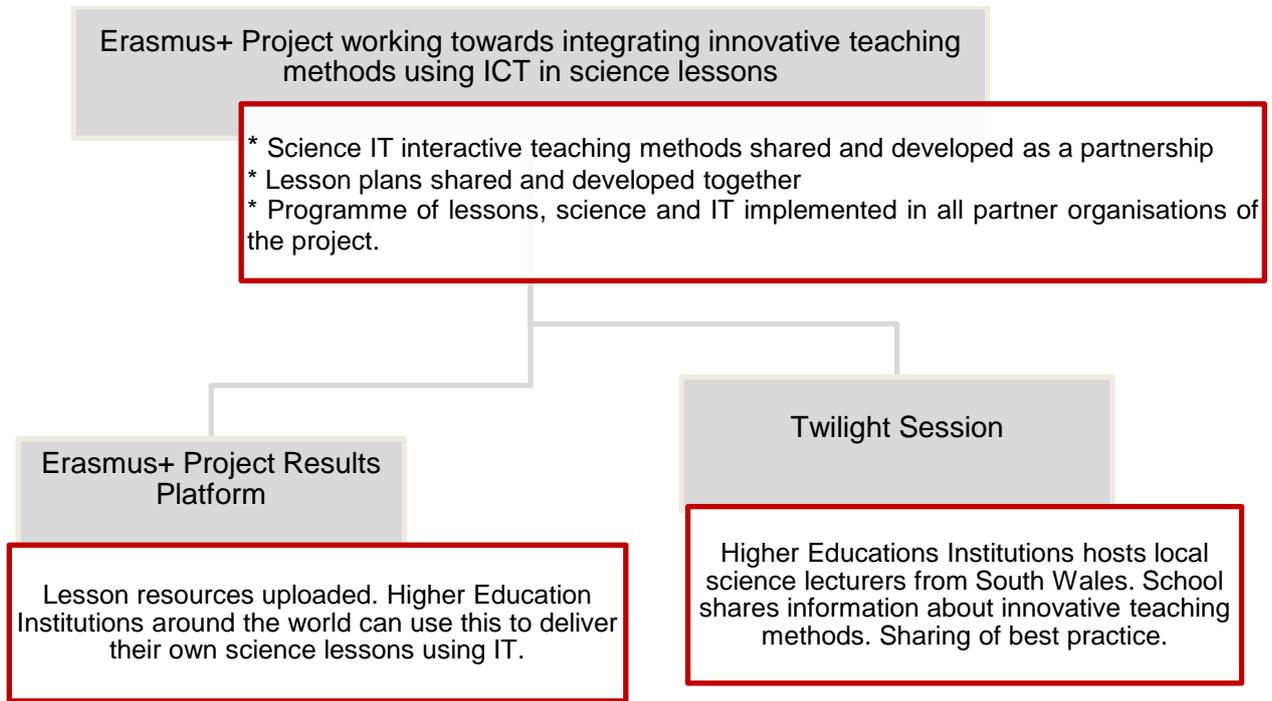
Intangible impact results may include for example:

- knowledge and experience gained by participants, learners or staff;
- increased skills or achievements;
- improved cultural awareness;
- Better language skills.

12.1 What is dissemination?

Dissemination is a planned process for providing information on the results of your project. It involves spreading the word about your project's results, successes and outcomes as far as possible. Dissemination is an essential part of all Erasmus+ funded projects and should raise awareness about your project, its activities and highlight the outcomes of the project. Participants, beneficiary organisations and host organisations should all be included within the project's dissemination activities. You should refer to the dissemination plan outlined in your application form, which should cover why, what, how, when, to whom and where the dissemination of results will take place.

Dissemination should be considered throughout the project, should be linked directly to the project's evaluation process and should take place both during and after the funding period. Dissemination consists of both concrete (tangible) results as well as of skills and personal experiences that both project organisers and participants to the activities have acquired (intangible results). Please see the following diagram:



For projects involving staff, it is particularly important that participants individually disseminate their findings, across both formal and informal networks upon their return from their mobility. Good practice and lessons learnt should be implemented within the participants’ own organisation and through wider local, regional, national and/or European networks.

Projects that produce good results on a participant level and on a wider scale may be used as case studies on the Erasmus+ website and in other media. This can be another way of disseminating the results and impact that your project has on the participants, organisation and wider community. If possible, it would be beneficial not only to send written information to us, but also, photographic evidence and/or videos of the participants on placement.

12.2 Impact+ Tool

The UK National Agency has developed the Impact+ Exercise to help applicants and projects think about what their impact could be and how to measure it. To find out more about the Impact+ exercise please see the website [here](#).

12.3 Using the Media and Press

International activity can provide interesting stories for the media, and Erasmus+ offers lots of opportunities for this. There is good scope for you to secure coverage in local and regional media for your activity. Coverage in your local paper, or on a local radio or TV station, allows you to share your successes with a wider audience and can provide good publicity for your organisation. Promoting Erasmus+ in the media also raises awareness of the Programme among other organisations so that they can reap the benefits of international activity too.

12.4 Supporting Documentation

To support your report, you are required to produce supporting documentation as evidence for certain aspects of your grant. Supporting documentation must be annexed with your final report. Failure to produce supporting documentation for a mobility or unit cost could make the mobility or unit cost ineligible for funding. Information about the supporting documentation required can be found in your Grant Agreement in Annex III. Some templates can be found on the [Manage Your Grant website](#).

Important note: You must ensure that the costs incurred as part of your Erasmus+ project are considered eligible in accordance with your project Grant Agreement. You must also ensure that expenditure is substantiated by adequate supporting documents that can be produced in the context of the checks or audits as described in your Grant Agreement.

Specific information about the supporting documentation that your organisation is required to retain for each budget category of your grant can be found in Annex III of your Grant Agreement.

We would like to remind you that your organisation should also keep evidence of all project expenditure. Keeping evidence of project expenditure by way of receipts and invoices is not only good practice but may be required as evidence should your project be subject to your organisation's internal audits or external audits associated specifically with your Erasmus+ project.

It is advisable to keep as much original information and evidence as possible in a project file. This will facilitate a smooth handover should your Erasmus+ project coordinator change during your project lifetime, and also help your organisation complete the narrative element of its Erasmus+ final report when the time comes.

12.5 Certificates of Attendance

Please ensure that all participants who travel abroad as part of the project return a Certificate of Attendance to your organisation. This is a **mandatory document** that will need to be attached to your final report as proof that Transnational Project Meetings and Learning, Teaching, Training Activities took place. You are free to use the [certificate](#) on our website as a template, or you can produce your own, provided it contains the relevant information needed as stipulated in your Grant Agreement. Template supporting documentation can be found on the '[Manage Your Grant](#)' webpage of our website. Participants undertaking structured courses must also retain their course fees invoice in addition to the Certificate of Attendance.

Please check your Grant Agreement to ensure that any course fees invoice contains the required information.

13 Monitoring Activities

The UK National Agency is required under its contract with the European Commission 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 kind 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 National Agency 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. 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 European Commission.

Please refer to section V. of Annex III – Financial and Contractual Rules for a full list and description of National Agency checks.

14 Contacting Us

The Erasmus+ Team for Higher Education is on hand to help you with any queries you may have regarding your Key Action 203 project. You can [contact us](#) via the following channels:

Erasmus+ Help Line

+44 (0) 29 2092 4311. Our helpline is open Monday – Friday 10:00 - 16:00 (UK time).

Erasmus+ Email

For project related enquiries you can contact us via: erasmus@britishcouncil.org

15 Social Media

Keep up-to-date with the Erasmus+ programme by connecting with us through our social media channels. We advertise events, deadlines and further information through the following channels:

 Sign up to our newsletter www.erasmusplus.org.uk/subscribe-to-our-newsletter

 Follow us on Twitter: [@erasmusplusuk](https://twitter.com/erasmusplusuk) / www.twitter.com/erasmusplusuk

 Like us on Facebook: www.facebook.com/ukerasmusplus

 View our YouTube channel: www.youtube.com/erasmusplusuk

16 Next Steps and Other opportunities

16.1 British Council Knowledge Centre

British Council Knowledge Centre is a resource where Higher Education Institutions can find International Higher Education reports, research, videos and blogs. The Knowledge Centre conducts

research and analysis, providing evidence to shape the global policy level debate around issues facing international research and higher education.

This vision and understanding of the international higher education landscape informs the strategies of institutions by highlighting global trends and emerging opportunities. There are different themes that can be explored, including innovation and industry, talent development and employability, national strategies and policies, partner collaboration and student mobility, among others.

16.2 International Higher Education

The International Higher Education team uses their expertise in higher education to build trust and understanding with other countries.

The International Higher Education team aims to support the capacity and capability of governments, institutions and individuals in the UK and other countries to take an active role in developing their country, their community and themselves.

16.3 International Higher Education Digest

Subscribe to the International Higher Education Digest to keep up-to-date with all British Council news, opportunities, events and reports on international higher education. You can subscribe to the International Higher Education Digest by clicking [here](#).

17 British Council Going Global

Going Global is a conference (29 – 30 June 2020, London) for leaders of international education to debate the future of further and higher education. Participants include but are not limited to:

- University vice-chancellors, presidents, rectors and their advisers
- College principals and their advisers
- Ministers and government representatives – central, regional and local
- Journalists – press and media
- Policy and strategy makers and their advisers
- Professional and trade bodies working in international education
- Those with a responsibility for internationalisation

The Going Global conference:

- provides a unique platform for knowledge sharing
- connects local, national, regional and global agendas
- provides a global network for policy makers and practitioners working in the field of international education
- supports evidence led policy decisions deriving from research and regional policy dialogues
- supports global thought leadership

The Going Global Conference has a different theme and is held in a different location each year. If you would like to learn more about Going Global, please click [here](#).

18 Euraxess – Researchers in Motion

EURAXESS - Researchers in Motion is a unique pan-European initiative providing access to a complete range of information and support services to researchers wishing to pursue their research careers in Europe or stay connected to it. It also supports researcher mobility and career development, while enhancing scientific collaboration between Europe and the world.

EURAXESS is a unique European Research Area (ERA) initiative providing access to a complete range of information and support services for European and non-European researchers wishing to pursue research careers in Europe. It offers access to the job market; assists researchers in advancing their careers in another European country and supports research organisations in their search for outstanding research talent. EURAXESS is a truly pan-European initiative, supported by 40 participating countries across Europe.

The EURAXESS portal is composed of four main sections devoted to four specific initiatives for researchers:

- EURAXESS Jobs is a stress-free recruitment tool where no charges apply.
- EURAXESS Services is a network of more than five hundred Service Centres located in 40 European countries.
- EURAXESS Rights provides all information regarding the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers, which aim at setting out rules and obligations of researchers, their employers and funders, as well as transparent and fair recruitment procedures through the Human Resources Strategy. Besides, information about Entry conditions as well as social security and pensions.
- EURAXESS Links is a networking tool for European researchers working outside Europe and non-European ones wishing to collaborate and/or pursue a research career in Europe.

For more information about Euraxess, click [here](#).

19 Useful Links

- [UK National Agency website](#)
- [Manage Your Grant \(HE\) website](#)
- [European Commission Erasmus+ website](#)
- [Mobility Tool+](#)
- [Mobility Tool+ Guidance](#)
- [2019 Erasmus+ Programme Guide](#)
- [Participant Portal](#)
- [EC Distance Calculator](#)
- [Europass website](#)
- [Erasmus+ Projects Results Platform](#)
- [Euraxess](#)

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