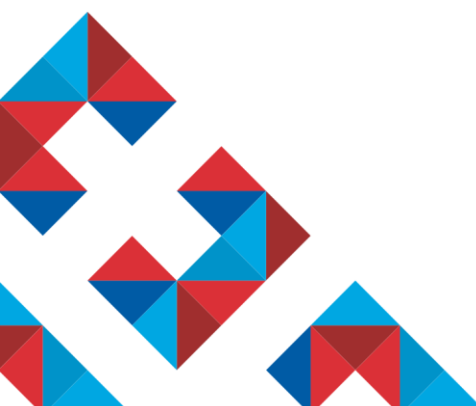


# UK National Agency Mobility Tool+ Guide for UK Higher Education Institutions: Processing KA103, KA107 and KA203 Force Majeure cases due to Covid-19

Version 1: 20 May 2020

This guidance document is based on information available to the UK National Agency, and accurate on the above stated date. The guidance provided as part of this document may be subject to change. If you have any queries about the content of this document please contact [erasmus@britishcouncil.org](mailto:erasmus@britishcouncil.org).



## Overview of the document

This is version 1 of the guidance document. 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

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## 1. Introduction

Any unforeseeable, exceptional situation or event beyond the control of the parties that prevents either of them from fulfilling any of their obligations under the Agreement, which is not attributable to error or negligence on their part or on the part of the subcontractors, affiliated entities or third parties in receipt of financial support and which proves to be inevitable despite their exercising due diligence is considered as Force Majeure.

The following cannot be invoked as Force Majeure: labour disputes, strikes, financial difficulties or any default of a service, defect in equipment or materials or delays in making them available, unless they stem directly from a relevant case of force majeure.

The UK National Agency may accept additional costs of an extraordinary nature not foreseen in the initial budget, where duly justified (e.g. the cost could not be recovered under an insurance scheme, the generating event could not be rescheduled, etc.) on a **real cost** basis. Any additional expense claims must be supported by appropriate evidence of the cost incurred, such as receipts (which can be electronic versions) or, where receipts can't be obtained, a signed declaration stating that cost could not be recovered by other means. This evidence will need to be retained by beneficiaries as they may be requested at final reporting stage or if you are selected for a future audit.

Initially, we requested that you inform us of your Force Majeure claim via e-mail, alongside a completed 'Cancellation of Planned Mobilities' form. We **no longer require** beneficiaries to e-mail us with this information or to complete this form. If you have already sent this, please note that **you will also need to follow the Mobility Tool+ process outlined in this guide.**

Article 2 from the General Conditions of Annex II from the KA1 Grant [Agreement](#) for studies and traineeship states; 'In case of termination by the participant due to "force majeure", i.e. an unforeseeable exceptional situation or event beyond the participant's control and not attributable to error or negligence on his/her part, the participant shall be entitled to receive at least the amount of the grant corresponding to the actual duration of the mobility period. Any remaining funds shall have to be refunded, except if agreed differently with the sending organisation.'

## 2. Coronavirus guidance

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. Unit costs or real costs?

Inputting the actual mobility dates (the duration of the learning period) will generate the Erasmus+ grant that a mobility participant is entitled to (**unit cost**). Where an additional cost has been incurred, the UK National Agency will consider the actual cost, and may reimburse the beneficiary on a **real cost** basis. Such decisions will be made on a case by case basis. An additional cost is a cost that the participant has incurred for any necessary expenditure not covered by the grant intended for actual learning period e.g. an additional flight ticket to return home.

Whilst the UK NA recommends that UK beneficiary organisations use the Erasmus+ grant to help mobility participants and minimise the negative financial impact of Covid-19 by covering the additional incurred costs on a real cost basis, we understand that organisations need certain flexibility. It is therefore at each organisation's discretion to authorise the additional cost incurred, so long as the institution's system put in place is fair and applied consistently.

## 4. Encoding KA1 Force Majeure in MT+

It is important that Force Majeure cases are reported accurately via MT+ as advised in this Guide.

In the **Mobilities** tab in MT+, when either creating or editing a mobility the checkbox **Force Majeure** is available. When checked, the comment field **Force Majeure Explanations** must be completed. The justifications for indicating the mobility as **Force Majeure** should be added here.

Periods of distance/online learning, whether in the host or home country, or both, can be considered eligible for Erasmus+ funding under the following conditions:

- 1) The online learning is offered by the host institution or enterprise abroad
- 2) The content contributes to the achievement of the learning objectives as specified in the learning/traineeship agreement

The start and end dates of a mobility impacted by the coronavirus should indicate the beginning and the end of the participant's learning period, including distance learning. If these dates don't match the real time spent abroad, the arrival and departure dates should be noted in the Force Majeure comment field in MT+.

To allow for accurate encoding of such a scenario about the specific mobility, once checked the mobility no longer adheres to the standard business rules.

Depending on the call year and key action type a number of fields and calculations may be affected.

The fields and calculations are changed as follows:

- **"Total Number of Teaching Hours"** - The business rule checking the minimum of 8 hours per week will no longer apply in case of Force Majeure.
- **"Duration Calculated (days)"** - The business rule checking the minimum duration will no longer apply in case of Force Majeure.
- **"Duration of the Mobility Period (days)"** - The business rule checking the minimum duration will no longer apply in case of Force Majeure.

- **"Total EU Travel Grant"** - The field will become editable. If any values were already present, they will remain.

TRAVEL GRANT

EU Travel Grant - Grant Not Required

EU Travel Grant  €

No. of Expensive Domestic Travels

Top-up for "Expensive Domestic Travel Cost"?  €

Total Top-up for "Expensive Domestic Travel Cost"  €

**Total EU Travel Grant**  €

Please explain the nature of the expensive domestic travel costs

value required

- **"EU Individual Support"** - The field will become editable. If any values were already present, they will remain.

EU Individual Support - Grant Not Required

EU Individual Support  €

- **"Organisational Support"** - The field will become editable. If any values were already present, they will remain.
- **"Organisational Support Grant/Day"** - The field remains locked. It shows a value obtained by dividing field Organisational Support by field Funded Duration (days) rounded to 2 decimals.

Project 2017-1-PL01-KA104-027837 follow-up

Details Organisations Contacts Mobilities Mobility Import - Export **Budget** Reports

Budget [Export PDF](#) Version Reported (Open)

Nothing to save

	Approved Budget (by National Agency)	Current Budget (in Mobility Tool)	% Current/Approved budget
<b>Total Project</b>	80.570,00 €	4.650,00 €	5.77 %
<b>Organisational Support</b>		350.00 €	
No. of Participants (excluding acc. persons) : 1	10.500,00 €	300	2.86 %

**Note:** A participant in a mobility flagged as **Force Majeure** (even if potentially unavailable) will continue receiving a system notification regarding the Participant Report to be filled in at the end of the mobility, however, the standard obligation of submitting a survey, directly and exclusively linked to the action, will not apply in case of force majeure.

## 5. Practical scenarios:

### Scenario 1 – A scheduled mobility for which costs were incurred does not take place

1. Register the mobility and participant data
2. Tag the mobility as Force Majeure
3. Fill in Force Majeure comments, explaining the situation and using the keywords 'Coronavirus' or 'COVID-19'
4. Fill in the same Start Date and End Date => Duration = 1 day
5. The Travel Grant and Individual Support are editable and can be used for adjustments, based on real cost. Only approved costs should be entered into these fields\*
6. Keep evidence of incurred cost on your files.

**Note:** all the mobilities flagged as Force Majeure and with the same start and end date will be excluded from the general statistics. These mobilities will also be excluded from generating EU Survey.

Initially, we requested that you inform us of your Force Majeure claim via e-mail, alongside a completed 'Cancellation of Planned Mobilities' form. We **no longer require** beneficiaries to e-mail us with this information or to complete this form. If you have already sent this, please note that **you will also need to follow the Mobility Tool+ process outlined in this guide.**

### Scenario 2 – A scheduled mobility for which costs were not incurred does not take place

Such mobility shall not be recorded in MT+.

### Scenario 3 – Host university/organisation closes down but offers to continue mobility via the distance learning provision

1. Register the mobility and participant data - the start and end dates of a mobility should indicate the beginning and the end of the learning period, including distance learning. If these dates don't match the real time spent abroad, the arrival and departure dates should be noted in the Force Majeure comment field.
2. Tag the mobility as Force Majeure



3. Fill in Force Majeure comments, explaining the situation and using the keywords 'Coronavirus' or 'COVID-19'. Record the real dates spent abroad if different from the mobility (learning) dates in this comment field.
4. The Travel Grant and Individual Support are editable and can be used for adjustments.
5. Keep evidence of incurred cost on your files.

**Note:** the mobility participant must have started their mobility abroad to be eligible for the grant for distance learning. Periods of distance/online learning, whether in the host or home country, or both, can be considered eligible for Erasmus+ funding under the following conditions:

- 1) The online learning is offered by the host institution or enterprise abroad
- 2) The content contributes to the achievement of the learning objectives as specified in the learning/traineeship agreement.

Mobility participants receive an EU grant as a contribution to their costs for travel and subsistence during the period abroad. The exact amount (**unit cost**) is based on the distance band and length of a mobility. Any additional cost that mobility participants encountered may be reimbursed by the home institution based on **real cost** as per receipts provided.

## Scenario 4 – Host university/organisation closes down and doesn't offer to continue mobility via the distance learning provision. Mobility participant returns to the UK

1. Register the mobility and participant data - the start and end dates of a mobility should indicate the beginning and the end of the learning period\*. If these dates don't match the real time spent abroad, the arrival and departure dates should be noted in the Force Majeure comment field.
2. Tag the mobility as Force Majeure
3. Fill in Force Majeure comments, explaining the situation and using the keywords 'Coronavirus' or 'COVID-19'
4. The Travel Grant and Individual Support are editable and can be used for adjustments, in case the student qualifies for additional eligible costs. If possible, any participant that was unable to complete their mobility abroad or virtually should only have costs encoded for the time spent abroad. Should the participant be eligible for further costs in addition to those of their actual mobility period then this can be adjusted for via editing the Travel Grant and Individual Support fields.
5. Keep evidence of incurred cost on your files.

\* Learning period is considered as time mobility participants endeavour to achieve the learning objectives as specified in the learning agreement and as such is covered by Erasmus+ mobility grant (unit cost), as mentioned in chapter 3 of this handbook.

It is the responsibility of the beneficiary organisation/institution to authorise this additional cost, after having verified, on a case-by-case assessment, that the grant awarded to the project can cover this additional real cost.



Please be aware that an “additional cost” is a cost that the participant has incurred during a period of time that falls outside of the actual dates of mobility.

**Note:** the minimum duration requirement for mobilities impacted by the coronavirus doesn't apply, i.e. if a mobility participant returned prior to meeting the standard minimum duration requirement, the Short Duration Request form doesn't need to be submitted.

### Scenario 5 – Host university/organisation closes down and doesn't offer to continue mobility via the distance learning provision. Mobility participant remains abroad.

1. Register the mobility and participant data - the start and end dates of a mobility should indicate the beginning and the end of the learning period. If these dates don't match the real time spent abroad, the confirmed arrival and planned (if known) departure dates should be noted in the Force Majeure comment field in MT+. N.B. Records for participants that have not planned their return should not be completed until a planned departure date has been agreed.
2. Tag the mobility as Force Majeure
3. Fill in Force Majeure comments, explaining the situation and using the keywords 'Coronavirus' or 'COVID-19'.
4. The Travel Grant and Individual Support are editable and can be used for adjustments
5. Keep evidence of incurred cost on your files.

It is the responsibility of the beneficiary organisation/institution to authorise this additional cost, after having verified, on a case-by-case assessment, that the grant awarded to the project can cover this additional real cost. Please be aware that an “additional cost” is a cost that the participant has incurred during a period of time that falls outside of the actual dates of mobility.

**Note:** the minimum duration requirement for mobilities impacted by the coronavirus doesn't apply, i.e. if a mobility participant returned prior to meeting the standard minimum duration requirement, the Short Duration Request form doesn't need to be submitted.

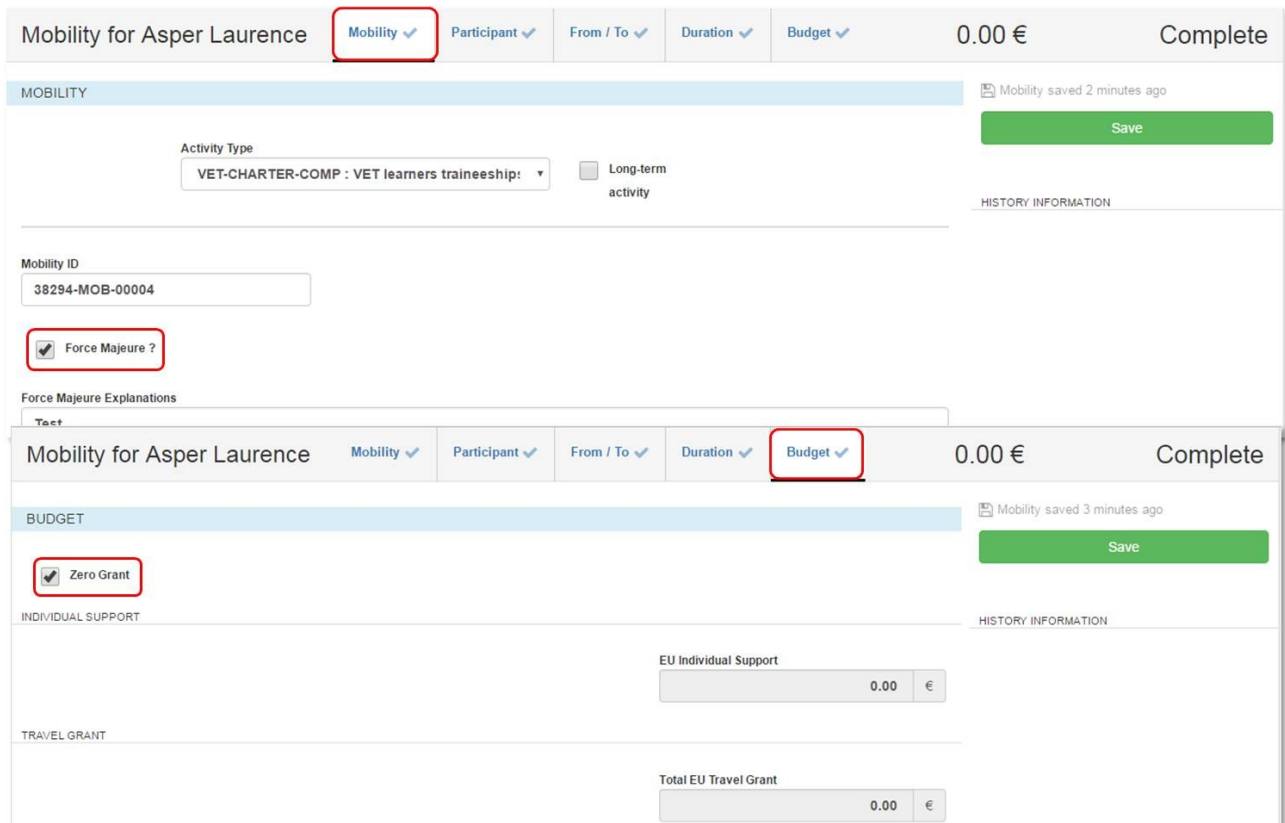
### Scenario 6 - Mobility flagged both as "Force Majeure" and "Zero Grant".

In exceptional circumstances you may need to check both flags "Force-majeure" in the **Mobility** tab and **Zero-grant** in the **Budget** tab. The system allows both to be checked at the same time.

Q: Can additional travel costs incurred by zero-grant students in higher education mobility be reimbursed in the same way as for students receiving a grant?

A: Participants can receive a grant that is higher than what was initially agreed. Therefore, the beneficiary can decide in exceptional circumstances to apply this provision also to zero grant

participants, even though, under normal circumstances, higher education students with a zero-grant do not receive an EU grant related to travel and subsistence.



The screenshot shows two panels of the Erasmus+ application interface. The top panel is titled 'MOBILITY' and shows a form for 'Mobility for Asper Laurence'. It includes dropdown menus for 'Mobility', 'Participant', 'From / To', 'Duration', and 'Budget', with a budget of 0.00 €. A 'Save' button is visible. The 'Activity Type' is set to 'VET-CHARTER-COMP : VET learners traineeship:'. There is a checkbox for 'Long-term activity' which is unchecked. Below this, the 'Mobility ID' is '38294-MOB-00004'. A checkbox labeled 'Force Majeure ?' is checked and highlighted with a red box. Below it is a 'Force Majeure Explanations' text field. The bottom panel is titled 'BUDGET' and also shows 'Mobility for Asper Laurence' with a budget of 0.00 €. A checkbox labeled 'Zero Grant' is checked and highlighted with a red box. Below this are fields for 'EU Individual Support' and 'Total EU Travel Grant', both set to 0.00 €.

## Scenario 7 – Eligibility of a future mobility solely undertaken via distance learning for Erasmus+ funding.

Such mobilities haven't been deemed by the European Commission as eligible for funding. Distance learning can currently only be approved as a means of continuing mobility.

## 6. Encoding KA2 Force Majeure in MT+

**Force majeure** applies to KA2 activities which due to an unforeseeable exceptional situation or event beyond the individual participant's control, could not be started or completed. These situations can arise at any time including factors such as sudden disease, accidents, death, earthquakes and other causes beyond the control of the participant.

While creating or editing an activity, when the checkbox **Force Majeure** is checked the comment field **Force Majeure Explanations** must be completed. The justifications for indicating the activity as **Force Majeure** should be added here.

KA2 activities where the Force Majeure check box is available:

## a. Learning, Teaching and Training Activities

In the case of **Learning, Teaching and Training Activities**, if **Force Majeure** box is checked the following fields and calculations will be affected as described below. Certain fields may vary in name, depending on the Action Type selected.

- **Duration Calculated (days)** - The business rule checking the minimum and maximum duration will no longer apply in case of Force Majeure.
- **Total EU Travel Grant** - The field will become editable. If any values were already present, they will remain.
- **EU Individual Support** - The field will become editable. If any values were already present, they will remain.
- **Linguistic Preparation?** - Applicable to participants whose activity type is long-term. The user checks the field.
- **Linguistic Support Grant** - The field remains locked.
- **Force Majeure Explanations** - This additional field is shown. The beneficiary must provide explanations about the force majeure event.

KA2 Force majeure - budget fields are editable.

The below functionality is available with Mobility Tool+ version 5.6.; Release date: 07/04/2020.

## b. Transnational Project Meetings

If the **Force Majeure** box is checked the **Total (Calculated)** becomes editable and can be used for adjustments.

## c. Intellectual Outputs (Intellectual Outputs - Organisation)

If the **Force Majeure** box is checked the **Total (Calculated)** becomes editable and can be used for adjustments.

## d. Multiplier Events (Multiplier Events - Detail)

If the **Force Majeure** box is checked the **Total (Calculated)** becomes editable and can be used for adjustments.

## 7. Where to find more help and advice

If you want to know whether an action is managed by National Agencies or EACEA, please consult the [Erasmus+ call for proposals page](#) where we list the actions and the bodies that manage them.

If you need more information on where to go to manage your organisation's data, organisation contact person, authorised users and public documents, please feel free to use the following links:

- [EC's MT+ Force majeure guidance due to Coronavirus](#)
- [EC's FAQ: COVID-19](#)
- [UK NA's Advice about Erasmus+ in relation to Coronavirus](#)
- [UK NA's Frequently asked questions](#)

## 8. UK NA Contact details

If you have any queries about this subject, please contact the respective Erasmus+ Helpdesk:

### Higher Education

Tel: 029 2092 4311

Email: [Erasmus@britishcouncil.org](mailto:Erasmus@britishcouncil.org)

### Adult education

Tel: 0121 212 8947

Email: [erasmusplus@ecorys.com](mailto:erasmusplus@ecorys.com)

### Vocational education and training

Tel: 0121 212 8947

Email: [erasmusplus@ecorys.com](mailto:erasmusplus@ecorys.com)

### Youth - Key Action 1

Tel: 0121 212 8947

Email: [erasmusplus@ecorys.com](mailto:erasmusplus@ecorys.com)

### Schools

Tel: 0161 957 7755

Email: [erasmusplus.enquiries@britishcouncil.org](mailto:erasmusplus.enquiries@britishcouncil.org)

### Youth - Key Action 2 and Key Action 3

Tel: 0161 957 7755

Email: [erasmus.youth@britishcouncil.org](mailto:erasmus.youth@britishcouncil.org)