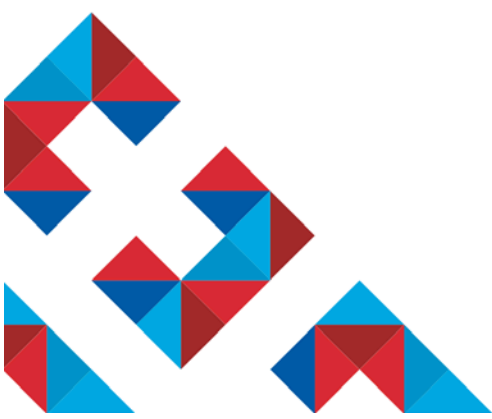


2020 Key Action 1 (KA1) Higher Education Handbook

For UK Higher Education Institutions and Consortia
Managing Higher Education Mobility Projects

KA107 (International Credit Mobility)

Version 1: 20 August 2020



This handbook is a guidance document for the management of Key Action 107 International Credit Mobility (ICM) projects. This handbook is designed to provide information to support your Grant Agreement, including all associated annexes and the [2020 Programme guide](#). Your Grant Agreement and the 2020 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 2020 Programme Guide, the content of the Grant Agreement, its annexes and the Programme Guide will take precedence. If you have any queries about the content of this Handbook, please contact erasmus@britishcouncil.org.

Overview of changes to the handbook

This is **version 1** of the 2020 Key Action 107 Operational Handbook. If future versions of this document are created, the table below will record an overview of changes made compared to previous versions:

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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 coronavirus, please visit our [dedicated webpage](#). Please check this page regularly or subscribe to our newsletter.

3. General

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

For more information about Erasmus+ and Key Action 1, please refer to the following sections of the [2020 Programme Guide](#):

General Information about the Erasmus+ Programme	.....	Pages 5 - 24
General Information about Key Action 1	.....	Pages 29 - 32
Key Action 1 Higher Education Mobilities	.....	Pages 33 - 52
Information for Applicants	.....	Pages 249 - 268
Specific rules relating to KA1 Higher Education Projects	.....	Pages 270 - 275
Dissemination - A practical guide for beneficiaries	.....	Pages 312 - 318
Glossary of Key Terms	.....	Pages 318 - 327
Useful References and Contact Details	.....	Pages 327 – 331

This Operational Handbook only applies to KA107 (International Credit Mobility) projects. For information on delivering KA103 (Mobility between Programme Countries) projects, please see the relevant KA103 Operational Handbook available on the [‘Manage Your Grant’](#) section of the website.

3.1. Eligibility and ECHE Compliance

The current ECHE (2014-2020) covers any Erasmus+ projects funded under the 2020 Erasmus+ Call and previous Call years, including where activities take place beyond 2020.

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

Compliance of the HEI with the ECHE principles is monitored by the National Agency through a variety of measures. HEIs must respect all the provisions of the ECHE during the implementation of the project. Violation of any of the ECHE principles and commitments may lead to its

withdrawal by the European Commission. You can find the recently published UK NA Compliance report which highlight areas of best practice [here](#).

Changes to the ECHE Policy statement

HEIs are able to update their Erasmus Policy Statement (“EPS”) at any stage during the Erasmus+ Programme cycle in order to reflect their latest strategy. To change an EPS, HEIs are required to amend the EPS on their website and notify the NA to ensure accuracy and compliance with the ECHE.

Consortium Changes

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

Mergers and Splits

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

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

Overseas Campuses or Franchises

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

If the campus located in another Programme Country is an independent institution, it should then apply for its own ECHE, and only when covered by that ECHE can students and staff take part in Erasmus+.

3.2. 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 in the agreement 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 2018 (footnote 1);

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

For more information please refer to the Grant Agreement – Special Conditions – Article I.14, the Grant Agreement – Annex VIII and the [2020 Programme Guide](#) - Data Protection article.

4. Grant Agreement issuing and signing

4.1. Establishing Grant Rates

Grant rates are established within parameters decided by the European Commission (EC). HEIs must pay all grants at the rates given in this Handbook and Annex IV of the Grant Agreement.

Allocation of Funds

The NA analyses applications carefully to ensure allocation of funds is fair and transparent. Grants to beneficiaries may be awarded for less than the amount applied for, but not more. The grant budget is allocated based on:

- overall KA107 budget;
- applications from individual HEIs, as assessed by the NA;
- grant rates established by the EC
- past performance.

4.2. Payment conditions

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

A first pre-financing payment of 40% 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.

If the HEI has an outstanding debt, this may delay the signature of the Grant Agreements, and the NA may offset this against any new Erasmus+ payments due. The NA may offset this against any new Erasmus+ payments due. The NA will give advance notice of an intention to offset debt.

4.3. Bank accounts and currency

All payments from the UK NA to HEIs 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

¹ Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data, Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC.

delay or exchange rate losses caused as a result of the HEIs bank account's inability to receive such payments.

The beneficiary 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 that are published in the C series of the Official Journal of the European Union, determined over the corresponding reporting period (available at [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.

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

Any conversion into euro of costs incurred in other currencies must be made by the beneficiary at the monthly exchange rate established by the Commission and published on its website applicable on the day when the bank account of the beneficiary is credited.

4.4. Grant awards

The Grant Agreement details the payment and reporting arrangements for the project. Grant recipients may not benefit from any other EC funding for the same activity, even if this is across years.

The Erasmus+ grant is intended to co-finance mobility activity. Under no circumstances may the grant give rise to a profit. Please see page 245-247 of the [2020 Programme Guide](#) for further information.

Amendments to agreements that must be requested in writing are stated in Article 4.2 of this Handbook or on pages 34-35 of the ICM [Handbook](#) released by the EC. Amendments to agreements take the form of a letter from the NA or a written amendment signed by both parties.

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

4.5. 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: Description of the Project; Estimated budget of the project**
- **Annex III: Financial and contractual rules**
This annex provides information on the financial and contractual rules surrounding the Grant Agreement. There are two versions of this annex; one for single organisation

beneficiaries and one for consortia beneficiaries. It is the responsibility of the beneficiary to read this information and to ensure compliance.

- o 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 clearly states what rates are applicable for incoming and outgoing students/staff for KA107 projects.
- **Annex V: Templates for agreements to be used between beneficiary and participants**
- **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 UK National Agency Processor to Sub-processor Contractual Governance**

4.6. Signatures

Note: Whilst normally an original paper copy of the Grant Agreement between the NA and the HEI must be signed with original signatures and kept in hard copy, due to the exceptional circumstances an electronic exchange and digital signatures have been permitted for the 2020 call.

Documents between home/host institutions and mobility participants can be signed by one party and scanned to another to be countersigned. Both the HEI and the participant must retain copies that are signed by all parties.

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

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

Important note: An “electronic signature” may be a scanned signature and locked pdf signature or other form of secure signature. **It cannot be a typed signature.** For more information please refer to your institution’s internal policy on digital signatures.

Whilst electronic signatures on Erasmus+ mobility documents are possible and widely accepted, it is each HEIs responsibility to ensure that the digital signatures comply with their internal institutional policy or procedures dealing with this matter.

4.7. Record keeping

HEIs must keep all applications and signed Grant Agreements for a period of **five years** (three years for grants not exceeding EUR 60,000) from the date of closure of the applicable Grant Agreement. This includes all applications and mobility agreements with students and staff, and documents concerning disbursement of grants, for all Erasmus+ mobilities. Please see page 266 of the [2020 Programme guide](#) and Annex I of the Grant Agreement for further information.

4.8. Dissemination

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

The HEI also agrees to promote the Erasmus+ programme and the mobility opportunities for their students and staff. This should include, but is not limited to:

- promotional talks by returning students at local schools, colleges, within the HEI etc.;
- production and posting of promotional materials;
- adherence to the requirements of the ECHE, including making the Erasmus+ policy easily accessible via the HEIs website.

Information on use of the European Union emblem can be found in Article II.8 of the Grant agreement's [General Conditions](#) and is also published on the [UK NA Promotion and Dissemination website](#).

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

5. Project activities

5.1. Period of Activity

The project duration is either 24 or 36 months, as specified in the HEI's application form and Grant Agreement. All mobility periods must be completed by the project end date as specified in section I.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 falls outside the terms of the Agreement).

For 24 month projects, the grant is awarded for mobilities taking place from 1 August 2020 to 31 July 2022.

For 36 month projects, the grant is awarded for mobilities taking place between 1 August 2020 and 31 July 2023.

Mobilities which take place across two Grant Agreement periods/call years should be reported as two separate mobilities, whilst each mobility must meet the minimum duration.

5.2. Making changes to your project

Change of project duration

You can change the duration of your project if this will be of benefit to you. 24 month projects can be extended to 36 months and 36 month projects can be reduced to 24 months. 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 reasons for extension.

Change of project coordinator and project contacts

If the coordinator changes during the Erasmus+ project, you need to complete and email the [Change of 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 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: EACEA-ECHE@ec.europa.eu

Changes without amendment of the Grant Agreement

You may:

- Set the duration of individual mobilities
- Increase or reduce the number of mobilities specified in Annex II of the Grant Agreement.
- Change staff teaching mobility to staff training mobility, and vice versa
- Change student mobility to staff mobility, and vice versa, provided the type of mobility is eligible.
- Transfer up to 100% of funds allocated for individual support to travel support, and vice versa. This is possible also between all student and staff mobility categories, provided funds are used for cooperation with the same Partner Country.
- Change incoming mobility flows to outgoing, and vice versa, provided the sum total of the changes incurred does not exceed 40% of the total project budget allocated in Annex II, and provided that the type and direction of the mobility is eligible. The 40% threshold is set to ensure that the core of the mobility project is respected.
- Transfer up to 50% of the funds allocated for organisational support to individual support (including, from Call 2019 and if applicable, top-ups for students from

disadvantaged backgrounds) and travel for student/staff mobility as well as special needs support.

Changes requiring amendment of the Grant Agreement

Conditional upon the NA's approval, you may, with an amendment:

- Change incoming mobility flows to outgoing, and vice versa, where the sum total of the changes incurred exceeds 40% of the total project budget allocated in Annex II, provided that the type and direction of the mobility is eligible
- Add new Partner Country HEIs, that in the original application
- Change the duration of your project, from 24 to 36 months and vice versa.

5.3. Selection Procedures

The selection of staff/students, as well as the procedure for awarding them a grant, must be fair, transparent, coherent and documented and must be made available to all parties involved in selecting students and staff. Please see examples of selection criteria for on pages 271 in the [2020 Programme Guide](#)

HEIs must also provide assistance, when required, in securing visas for incoming and outbound mobility participants.

5.4. Agreements with Individuals

Grant Agreement

Before a staff or student mobility commences, the HEI must ensure that each student or staff member has signed a mobility Grant Agreement (GA) with their home HEI, formally accepting the grant and acknowledging the obligations associated with its acceptance. Exceptionally, the GA must be signed by all parties no later than within 2 months (60 days) since the mobility start date.

The agreement must be retained as a record of the mobility. If the HEI does not retain the signed agreement, in hard copy or electronically, the NA may recover the grant at a future audit. Scanned copies of documents with original signatures are acceptable for audit purposes.

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

There are no specific Covid-19 measures related to this article, i.e. the Grant Agreement must be signed even if a mobility takes place virtually.

Student Learning Agreement

The sending HEI, the host HEI or other organisation, and the mobile participant, will need to sign the Learning Agreement (LA) for studies and traineeships or the staff teaching or training agreement.

Prior to the mobility start date, the student, the home HEI and the host HEI must sign the Learning Agreement. Exceptionally, the Learning Agreement must be signed by all parties no later than within 2 months (60 days) since the mobility start date.

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

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

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

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

Staff Mobility Agreement

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

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

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

5.5. Inter-Institutional Agreements

The 2014-2020 template for Inter-Institutional Agreements (IIA) is related to the current Erasmus+ programme. Therefore, if you participate as part of the 2020 call, the 2014-2020 IIA template should be used and will, by default, be valid until the end of the project, unless agreed differently with your partner institution(s).

Mobility between Programme Country HEIs

Student study mobility and **staff teaching** mobility must be covered by an Inter-Institutional Agreement. It must be signed **before mobility begins**. The Inter-Institutional Agreement may cover cooperation between more than one HEI. The international version of the Inter-Institutional Agreement incorporates aspects of the ECHE into the agreement. The template is available to download on the [Erasmus+ website](#) under the 'Agreements' section. **The original text cannot be altered, although extra clauses may be added.**

Mobility between HEIs and providers of student traineeships and staff training

Unlike partner HEIs, non-academic partners do not sign the interinstitutional agreement. The rules and obligations of all parties should be detailed in the Learning Agreement for Traineeships. For more information please refer to page 24 of the ICM Handbook provided by the EC.

Multiple Institutions in the same Partner Country

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

5.6. Protection and safety of participants

Protection and safety of participants involved in the 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. EU Survey (Participant report)

30 days before the mobility end date, students will receive an invitation to submit an individual participant report. Staff will receive the invitation on their mobility end date.

The online report request will be automatically generated and the survey must be completed by all mobility participants within 30 days of completing their mobility. The participant reports will not be sent out if the mobility is in draft, i.e. mobility record must be either completed or revalidated in order for the survey to be sent to the participants.

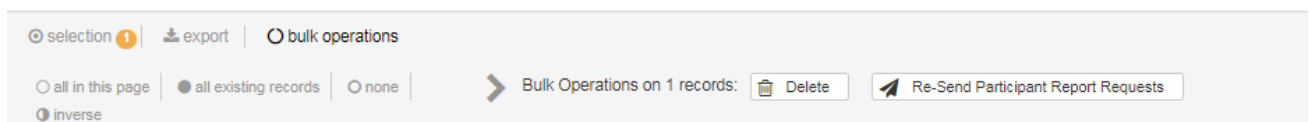
Completion of the EU Survey forms part of the Grant Agreement, HEIs are responsible for ensuring individuals complete these reports.

When filling the standard participant report, if the student reports that the process of recognition is not finalised, they will not be asked to complete the recognition section. The student will then receive the section on the recognition process in a separate Participant Report on Recognition, one month after the mobility has ended. There will be no deadline for submitting this report that can be completed any time after the recognition process is finalised.

Re-issuing EU Survey

You can resend the Participant's Report manually from the Mobility Tool+ (MT+) by following these steps:

- enter your project and go to the 'Mobilities' tab (you can search for the participant using the search engine)
- click on the circle button next to the participant's first name so it fills with black colour
- click on Bulk operations
- click on Resend participants report requests



Mobility participants should receive the EU Survey to the email address listed in the MT+ participant's record and it will come from the address 'replies-will-be-discarded@ec.europa.eu'. We advise all mobility participants to check their email spam box before reporting that the survey hasn't been delivered.

Completing the EU survey is a contractual obligation and the UK NA will require justification of any missing reports.

For more information please refer to the [Mobility Tool+ - Guide for Beneficiaries](#).

5.8. Incoming Erasmus+ Mobility

HEIs must make appropriate provision for the health, safety and security of incoming students and staff in the same way as for any other visitor. This includes compliance with all relevant legislation.

Incoming students are not subject to fees for tuition, registration, examinations and access to laboratory and library facilities or other charges at the receiving institution. However, small fees may be charged for costs such as student unions or the use of miscellaneous material such as photocopies, laboratory products, on the same basis as these are charged to local students.

5.9. Early Returners, Short Durations and Interruptions of Mobility Periods

Early Return

If a mobility participant returns earlier but the mobility meets the minimum duration requirement, the HEI can process this change in Mobility Tool+ without reporting to the UK NA. The Erasmus+ financial grant can cover only the actual period spent abroad and any overpayment must be returned to the project, either by requesting the difference from the mobility participant or by using the Organisational Support budget.

Short Duration Requests

A short duration request is applicable for students or staff members taking part in Erasmus+ who do not meet the minimum duration required for their stay, due to force majeure.

As per page 321 of the [2020 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**'. Therefore, short duration requests should not be submitted for placements that have not yet started.

Requests should be made only in clear and certain circumstances which are beyond the control of the student and which have an impact upon the student's course progress or wellbeing. Generally, this will include:

- serious illness or injury, where a medical certificate states that the student was unable to attend classes
- bereavement related to close family members such as parents or grandparents

- major political upheaval or natural disaster in the host country requiring emergency travel and this has impacted the student's studies; or
- a traumatic experience which could include involvement in/witnessing of a serious accident; or witnessing or being the victim of a serious crime, and this has impacted on the student.

In order to comply with European Commission's requirements, we expect full evidence to be provided for the circumstances mentioned above. Force majeure does NOT cover:

- disputes between students and institutions that could potentially be resolved, particularly with traineeship placements;
- cancelled classes by the host institution;
- students / staff simply wanting to return home;
- foreseeable circumstances that could be resolved by either the student, sending or host institution; or
- 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 as identified on page 4 of the [General Conditions](#).

Please note this list is not exhaustive and we look at each request on a case by case basis.

To notify the UK NA of a shortened mobility, please use the [short duration request form](#).

Note: The UK NA does not require beneficiaries to submit a Short Duration Request form for early returns due to Covid-19.

If a short duration request is approved, the HEI must amend the mobility record in Mobility Tool+ to the real dates spent abroad and tick the Force Majeure box. The Erasmus+ financial grant can cover only the actual period spent abroad and the mobility participant must be entitled to receive the amount of the grant corresponding with the actual duration of the mobility. Any remaining funds must be refunded either by requesting the difference from the mobility participant or by using the Organisational Support budget.

In case of suspension by the participant of the Grant Agreement with the beneficiary due to force majeure, the participant must be allowed to continue the activities after the interruption, provided that the mobility end date does not exceed the final date of the project. This should be reported in Mobility Tool+ as a single mobility with an interruption period.

If a short duration request is rejected, the HEI must delete the mobility record from Mobility Tool+ and return the Erasmus+ financial grant to the project either by requesting the difference from the mobility participant or by using the Organisational Support budget.

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

Interruptions

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

5.10. Visas

Depending on their nationality and country of destination, non-EU nationals might need a short-stay or a long-stay visa or a residence permit.

UK HEIs must provide assistance, where required, in securing visas for their outbound mobility participants, however, the mobility participants themselves remain responsible for the visa application. The HEI must post information about visas and the time needed to obtain a visa on its website and provide documentation to support visa applications in a timely fashion. The website should, where possible, provide details of a contact person who can assist with visa related issues, with a description of the services offered and the support that can be provided.

UK HEIs are strongly advised to warn partner institutions that the UK visa process can be lengthy. This also applies to incoming trainees, where the UK NA is the sponsor. In these cases, the process is shortened if all documents are submitted to the UK NA with the visa application at least two months before the date of travel, and in the correct format. Sending institutions should cover fees, insurance and bank transfer costs (or part of these) using Erasmus+ organisational support or project management funds, i.e. not deducting these from the participant's individual support grant. Any cost charged to the participant should be clearly explained to them and agreed to by both parties, in advance.

For more information please refer to the [EU Immigration Portal](#).

5.1. Academic Fees

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

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

5.2. Tuition Fee Contribution and Support

For the 2020/21 academic year, Tuition Fee Contributions and Support will apply to students who start courses at institutions in the UK on or after 1 September 2012 who are taking an Erasmus+ study year or Erasmus+ traineeship for a complete academic year abroad. The

definition of a complete academic year for this purpose is at least 24 weeks (excluding weekends and the usual holidays).²

5.3. Grant Status of Students and National Schemes

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

5.4. Erasmus+ Student Charter

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

5.5. Multiple Erasmus+ Periods

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

This maximum duration applies if a student has undertaken a degree of the same level previously. This rule applies to each study cycle. Students can undertake numerous mobilities providing they do not exceed a total of 12 months participation in any one cycle.

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

6. IT Tools

6.1. Online Linguistic Support (OLS)

Please note that the [Online Linguistic Support](#) (OLS) is not available to Key Action 107 projects.

6.2. Mobility Tool+ (MT+)

Once the participants are selected, the beneficiary organisation must encode general information regarding the participant and the type of mobility activity s/he will carry out (e.g. participant name, destination, duration of the mobility, etc.) into Mobility Tool+. The beneficiary organisation is responsible for updating the Mobility Tool+ at least once a month

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

during the lifetime of the mobility project with any new information regarding the participants and the mobility activities.

Note: The UK National Agency has produced a guide to help institutions process Force Majeure cases due to Covid-19. For more information please also refer to Article 11 of this Handbook.

Mobility Tool+ will support the beneficiary in the management of the Erasmus+ mobility activities. Beneficiaries will be able to generate prefilled reports from Mobility Tool+ based on the information they have provided. Mobility Tool+ will generate mobility reports to be filled in by the participants.

Note: The European Commission is in the process of updating Mobility Tool+ to allow for inputting virtual and blended mobilities. A new version of Mobility Tool+ will be available in September 2020, an updated version of our Mobility Tool+ Guidance will be released shortly after, to reflect these changes.

For more guidance on Mobility Tool+ please read this [Mobility Tool+ Guidance for Beneficiaries](#).

6.3. Organisation Registration System

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](#)

6.4. Project Result 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+.

KA107 beneficiaries may use the Erasmus+ Project Results Platform to disseminate project results.

As a security measure, on 8 June 2020 the European Commission has introduced a two-factor authentication (2FA) for users of the Erasmus+ Project Result Platform. To access the PRP you will need to install and initialise the EU Login Mobile App on your mobile or tablet. The EU Login Mobile App is free of charge and can be obtained from the Google Play Store (Android), the App Store (iOS) or the Windows Store (Windows Phone). These verification methods will not require you to share your personal mobile number, should you be using your personal mobile device. For instructions on how to install and initialise the App, please see page 12 of the [EU Login Tutorial.pdf](#). Guidelines on how to use either of the verification methods can be found on pages 5 (**PIN code**) and 6 (**QR code**).

7. Student mobilities - study

7.1. Eligibility

To be eligible, students must be:

- Formally registered at a Partner Country HEI whom has signed the international version of the Inter-Institutional Agreement.
- Formally registered at a UK HEI (which holds an ECHE) and undertaking higher education studies leading to a recognised degree or other recognised tertiary level qualification, up to and including the level of doctorate; or
- Be enrolled in short-cycle higher vocational education⁴ (in the UK this includes Foundation Degree and HND courses) at an HEI which holds an ECHE;

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

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

7.2. Eligible Student Study Activity

Grants for study can be awarded only for full time undergraduate or postgraduate study placements, including thesis preparation (but excluding research activities not specifically forming part of a course of studies), leading to a recognised diploma or degree, at a partner country HEI who has signed the international version of the inter-institutional agreement.

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

7.3. Duration of Study Mobility

Erasmus+ mobility for study must be between a minimum of three months (or one academic term or trimester) and a maximum of twelve months (360 days), per cycle. In one-cycle study programmes, such as Medicine, students can be mobile for up to 24 months.

Note: For students whose mobilities are impacted by Covid-19, the maximum duration of 360 days may be exceeded in exceptional circumstances. For the UK NA to consider such cases, please email erasmus@britishcouncil.org with an explanation of the situation and why it may be necessary to exceed the maximum duration.

The duration should be based on full months of 30 days (regardless of whether the months are of 28, 29, 30 or 31 days), plus any remaining days. A year is considered as 360 days.³

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

As stated in the Grant Agreement's Financial and Contractual Rules, without prejudice of the respect of the minimum eligible duration, if the confirmed period of stay is shorter than the one indicated in the grant agreement, the beneficiary will act as follows:

- If the difference between the confirmed period and the one indicated in the grant agreement is more than 5 days, the beneficiary must update this in Mobility Tool+ by indicating the confirmed period (i.e. the start date and end dates notified in the Transcript of Records or Traineeship Certificate) and the grant will be recalculated.
- On the contrary, if the difference is 5 days or less, the beneficiary must maintain in Mobility Tool+ the period indicated in the grant agreement (i.e. the grant is not recalculated)

Prolongation of students' mobility

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

- The request for extension of the mobility period must be asked for at least **one month** before the end of the mobility period initially planned.
- The extension must immediately follow after the current mobility period. There should be no gaps and the extension will need to be agreed by all parties, in writing.

⁴ Defined as post compulsory education but sub bachelor level courses which lead to the award of a 'degree' after 18 months/two years; vocationally oriented courses taken after completion of secondary education and leading to a degree on completion of two years (sometimes 1.5 years) study. This corresponds to the short cycle qualifications – approximately 120 ECTS – as described in the Framework for Qualifications of the European Higher Education Area.

Important note: No student mobility period, including any extension granted, will be funded for more than 12 months, except for mobilities impacted by Covid-19 and where duly justified and accepted by the NA.

7.4. ISCED 2013 Codes

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

Not further defined and not elsewhere classified

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

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

7.5. Recognition

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

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

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

EuroPass is also an acceptable way in which to provide recognition. For more information, please see the EuroPass [website](#).

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

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

8. Student Mobility - traineeship

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

For a list of eligible / ineligible organisations please see page 35 of the [2020 programme guide](#).

8.1. Eligible Student Traineeship Activity

There are two different provisions for traineeships:

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

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

8.2. Duration of Student Traineeships

Erasmus+ traineeships must be between two and twelve months, excluding travel time. In one-cycle study programmes, such as medicine, students can be mobile for up to 24 months.

The duration should be based on full months of 30 days (regardless of whether the months are of 28, 29, 30 or 31 days), plus any remaining days. A year is considered as 360 days.

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

8.3. Recognition

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

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

After the mobility, the receiving organisation/enterprise should send a transcript of records to the trainee and sending institution.

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

See also the EuroPass [website](#).

8.4. Student Mobility–Combined

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

8.5. Erasmus Intern

The Erasmus Student Network has created an online platform for traineeship providers to advertise their available traineeships. Students can browse, contact traineeship providers, apply for traineeships and they can also advertise themselves and their traineeship interests.

The online platform can be found here: <http://erasmusintern.org>

8.6. IAESTE

Outgoing students who have a placement under [IAESTE](#) are eligible for an Erasmus+ grant provided that the placement fulfils all criteria for an Erasmus+ placement. Documentary and reporting requirements are the same as for all other Erasmus+ students.

8.7. Student Mobility Grant Rates

Student grants are a flat grant calculated at monthly rate. Grants are a contribution towards the costs of the planned Erasmus+ mobility period. The grant rate is set at the beginning of the year and will not change. All students should be paid at the appropriate rate.

The HEI must make a first payment of between 70% and 100% of the grant specified in the agreement within 30 days of signature of the student Grant Agreement by both parties and no later than receipt of confirmation that the student has arrived at the host institution. This is specified in the Student Grant Agreement, available in the Agreements section of the Erasmus+ [website](#).

Eligible students will be awarded the grant as indicated in the table below:

From	To	Amount
Partner Countries	Programme Countries -> UK	€900 per month
Programme Countries (UK)	Partner Countries	€700 per month

Student Travel Grants

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

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

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

9. Staff Mobility

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

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

9.1. Duration

Mobility for staff teaching and staff training may be from **five days** to **two months**, excluding travel time. For teaching mobilities, the activity must comprise a minimum of 8 hours of teaching per week (or any shorter period of stay). If the mobility lasts longer than one week, the minimum number of teaching hours for an incomplete week should be proportional to the duration of that week.

9.2. Recognition of Staff Mobility

HEIs must recognise staff mobility assignments, as described in the ECHE and in the Agreement with the staff member. The staff member should disseminate learning to their colleagues at the appropriate level in line with requirements for dissemination of outcomes of activity (see pages 312 – 316 of the [2020 Programme Guide](#))

9.3. Staff Mobility – Teaching

Teaching staff employed by a HEI holding an ECHE may undertake Erasmus+ staff mobility for teaching. The teaching period must be in a partner HEI, which must hold ECHE accreditation and an Inter-Institutional Agreement must be in place with the staff member's home HEI.

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

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

9.4. Staff Mobility – Training

Erasmus+ training periods support the professional development of HEI teaching and non-teaching staff, as well as the development of involved institutions from programme or partner country HEIs. The training period may be in another HEI or any other appropriate organisation. A host HEI must sign an Inter-institutional agreement with the Partner Country HEI.

Training events abroad may be in the form of job shadowing, observation, attendance at workshops or courses etc. This may be for transfer of knowledge and good practice, to learn from shared experience, acquire practical skills or to discover new ideas for teaching and learning.

Important note: Attendance to a conference is not funded under Erasmus+ Key Action 1.

Prior to departure, the full training programme must be agreed formally by the home and host HEI or enterprise, by exchange of letters or electronically. Minimum requirements for the training programme are in the Staff Mobility Agreement. Evidence must be kept that this has been agreed prior to departure, and any amendment must also be formally agreed and retained. Changes may be communicated electronically.

The European Commission have created a website detailing the staff training opportunities, such as International Weeks. You can find the website [here](#).

9.5. Staff Mobility - Combined

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

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

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

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

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

9.6. Staff Mobility - Grants

Mobility grants for staff are provided as contributions towards subsistence and travel. Staff subsistence and travel costs are paid as flat rates, regardless of pays on receipted expenditure.

An HEI can award funding for up to 2 travel days. If the staff member is participating in activities on the same day as travelling, they are not entitled to a travel day. Please note, travel days are not included within the minimum duration.

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

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

Receiving Country	1 Day	5 Days	6 Days	1 week	2 Weeks	3 Weeks	4 Weeks	2 Months (60 days)
UK	180	900	1,080	1,260	2,520	3,402	4,536	8,316
Partner Country	180	900	1,080	1,260	2,520	3,402	4,536	8,316

Staff Travel Grants

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

Travel Distances	Amount (per participant)
Between 10 - 99 KM:	20 EUR
Between 100 - 499 KM:	180 EUR
Between 500 -1999 KM:	275 EUR
Between 2000 - 2999 KM:	360 EUR
Between 3000 - 3999 KM:	530 EUR

Between 4000 - 7999 KM:	820 EUR
8000 KM or more:	1,500 EUR

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

9.7. Additional Support for Students and Staff

The HEI should ensure that any inbound or outbound student/staff participants considering participation in an Erasmus+ activity who have needs or requirements that would incur additional mobility costs are identified at the earliest possible opportunity. Once identified an evaluation should be made as to the extent of the additional funding required to support such a participant in their mobility. Where possible, existing budget within your awarded envelope for the receiving country in question should be utilised. If this is not possible then please contact the UK National Agency to discuss what further options may be available to you.

9.8. Zero Grant Participants

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

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

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

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

10. Covid-19 Specific measures

Due to the exceptional circumstances created by the COVID-19 pandemic, the European Commission has introduced a series of flexibility measures, taking into consideration the specificities and target groups of each supported activity:

10.1. Virtual mobilities

Student (applicable for both studies and traineeships)

- When possible, HEIs should encourage a blended mobility approach i.e start with a period of virtual mobility abroad, to be combined with a physical mobility abroad with a minimum duration as set out in the 2020 programme guide.

- In case of force majeure, the duration of the physical mobility period can be reduced or cancelled and be replaced by an extension to the virtual mobility period.
- Periods of interruption between the virtual period and physical mobility periods are allowed, provided that the activity is carried out within the project duration.
- During the “virtual period” the participant does not receive a grant (individual support) but beneficiary organisation receives the normal rate of organisational support per participant. Once the physical mobility period starts the student is entitled to get the normal grant for the period spent abroad.
- These activities need to be confirmed with supporting documents to verify participation. Virtual and blended mobility activities can be confirmed by the transcript of records.
- Both periods (virtual and physical) count towards recognition of learning outcomes.
- If duly justified and documented, beneficiaries can cover costs related to buying and/or renting of equipment and/or services necessary for the implementation of virtual and blended mobility activities even if no funds were initially allocated to the Exceptional costs budget category. For more information please refer to article 10.3 of this handbook.
- If duly justified and documented by the beneficiary, NAs may also consider eligible, subject to the process as described in Article 9.7 of this Handbook, any special needs support claimed in order to allow the participation of participants with special needs in virtual activities, under the same rules as specified in the Programme Guide.

Staff

- When possible, encourage to start with a period of virtual mobility, to replace -when appropriate or complement (blended mobility) a physical mobility abroad with a minimum duration as set out in the 2020 programme guide. In the case of force majeure, the duration of the physical mobility period can be reduced or cancelled and replaced with an extension of the virtual mobility period.
- Periods of interruption between the virtual and physical mobility periods are allowed, provided that the activity is carried out within the mobility project duration. During the “virtual period” the participant does not receive a grant (individual support) but the organisation receives the normal rate of organisational support per participant. Once the physical mobility period starts, the participant is entitled to get the regular grant for the period abroad.
- These activities will need be confirmed with supporting documents to verify participation.
- Both periods (virtual and physical) count towards recognition of learning outcomes.
- If duly justified and documented, beneficiaries can cover costs related to buying and/or renting of equipment and/or services necessary for the implementation of virtual and blended mobility activities, even if no funds were initially allocated to the Exceptional Costs budget category. For more information please refer to Article 11.3 of this Handbook.
- If duly justified and documented by the beneficiary, NAs may also consider eligible, subject to the process as described in Article 10.3 of this Handbook, any special needs support claimed in order to allow the participation of participants with special needs in virtual activities, under the same rules as specified in the Programme Guide.

The European Commission has clarified that mobility participants who travel to their host country and receive virtual learning (or a mixture of on-campus and online learning) are eligible to receive the Erasmus+ financial grant.

Mobility participants who remain in their home country and take part in virtual study/traineeship activity are not eligible to receive the Erasmus+ financial grant.

Erasmus+ participants can be offered the possibility to start their mobility through virtual activities, with the aim to combine the online learning/working with a physical mobility abroad at a later date, if and when the situation allows for it.

Verification of a virtual mobility undertaken abroad - normally, presence at the host HEI/organisation is verified with a confirmation of arrival/stay and/or a transcript of records (that de facto verifies physical presence). In the event that it is not possible for the host HEI to verify physical presence, e.g. the campus and all administrative services are closed and/or remain closed during the entire mobility, the arrival in the host country and/or physical presence during the entire mobility activity can be verified with plane or train tickets or other documents that can verify travel to and/or from the host country, in line with what is relevant in each situation.

The European Commission is in the process of updating Mobility Tool+ to allow for inputting virtual and blended mobilities. A new version of Mobility Tool+ will be available in September 2020, and an updated version of our Mobility Tool+ Guidance will be released shortly after, to reflect these changes.

10.2. Organisational Support

As you will still be receiving Organisational Support, this implies that the beneficiary organisation continues to be responsible for carrying out all necessary tasks to implement qualitative activities (preparation, support during the activity and follow-up) as identified in the programme reference documents, independently from whether the activity takes place physically, virtually or both.

10.3. Exceptional Costs

In light of the exceptional circumstances created by the COVID-19 pandemic, the UK National Agency has begun implementing a series of flexibility measures for the duration of the exceptional period, taking into consideration the specificities and target groups of each supported activity.

As mentioned above, beneficiaries are allowed to organise their activities virtually. It is anticipated that in certain circumstances there may be costs borne by the beneficiary for implementing virtual mobility. To help record such costs, a new line of budget (“Exceptional Costs for services and equipment”) is due to be implemented within the Mobility Tool in September 2020.

As detailed in the Addendum to your Grant Agreement, 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.

- Calculation of the grant amount: the grant is a reimbursement of 75% of the eligible costs actually incurred for buying and/or renting of equipment and/or services.
- Eligible costs: cover costs related to buying and/or renting of equipment and/or services necessary for the implementation of virtual mobility activities.
- Supporting documents: proof of payment of the cost incurred based on invoices specifying the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice.

Note: The budget category “Exceptional costs for services and equipment” will only be available for editing upon completion of the aforementioned Mobility Tool+ update. This is only applicable to beneficiaries that have had their request to use this budget category approved via the submission of the UK NA’s Exceptional Costs form (available on our [website](#) - tab National Agency and EC forms). Please be aware that these funds can only be requested once per institution, per project. We strongly recommend that all anticipated costs are collated prior to submitting the form.

This budget category is applied at project level and will merge the costs applied at project level with any participant / mobility specific costs that may have been individually recorded.

This budget category is based on actual expenditure and therefore copies of invoices and receipts will need to be retained for submission at Final Reporting stage. Any cost that is not sufficiently evidenced at Final Reporting will not be approved for funding, as such, it is critical that the above point is adhered with.

11. Budget management

11.1. Budget Transfers

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, without requesting an amendment of the agreement as specified in Article II.13 under the condition that:

- The Project is implemented in accordance with the approved project application and overall objectives described in Annex II,
- And the following specific rules are respected:
 - (a) The funds can only be used for cooperation with the Partner Countries indicated in Annex II and under no circumstances will it be possible to transfer any funds from any budget category to Organisational Support or between Partner Countries.
 - (b) The beneficiary is allowed to transfer up to 50% of the funds allocated for organisational support to individual support, travel and special needs support for student mobility (for studies and traineeships) and/or staff mobility.
 - (c) The beneficiary is allowed to transfer up to 100% of funds allocated for individual support to travel support, and vice versa, . This is possible both within and between student

- mobility (for studies and traineeships) and staff mobility as long as they continue being used for cooperation with the same Partner Country.
- (d) The beneficiary is allowed to transfer up to 100% of the funds allocated for travel and individual support for staff mobility to travel and individual support for student mobility (for studies and traineeships) taking place with the same Partner Country, and vice versa
 - (e) The beneficiary is allowed to transfer up to 100% of the funds allocated for travel and individual support for staff mobility for teaching to travel and individual support for staff mobility for training taking place with the same Partner Country, and vice versa
 - (f) Within a Partner Country the beneficiary is allowed to modify the direction of mobility flows provided that the type and direction of mobility is eligible with the specific Partner Country. All the changes considered together may not exceed 40% of the total project budget allocated in Annex II.
 - (g) In the case of mobility with countries in regions 6, 7, 8, 9, 10 and 11, it is not possible to transfer funds between incoming and outgoing flows for short, first and second cycle outgoing student mobility. In these countries it is not possible either to transfer funds from staff mobility or third cycle student mobility towards short, first and second cycle outgoing student mobility and vice versa.

11.2. Organisational Support (OS)

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

The OS grant rate is €350 per participant.

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

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

Important note: Zero grant students will be included in the calculation of the OS grant.

Eligible OS activity

The HEI may decide how the OS grant is to be used, provided it is used on activities related to the Erasmus+ HE mobility and that the HEI observes the EC and NA's rules as stated in the Grant Agreement and the [2020 Programme Guide](#).

OS is a contribution to any cost incurred by the HEI in supporting student and staff mobility, both incoming and outgoing, in order to comply with the quality commitments in the ECHE, for example:

- organisational arrangements with partner institutions, including visits to potential partners, to agree on the terms of the inter-institutional agreements for the selection, preparation, reception and integration of mobile participants; and to keep these inter-institutional agreements updated;
- provide updated course catalogues for international students;
- provide information and assistance to students and staff;
- selection of students and staff;
- preparation of the learning agreements to ensure full recognition of the students' educational components; preparation and recognition of mobility agreements for staff;
- linguistic and intercultural preparation provided to both incoming and outbound students and staff, complementary to the Erasmus+ Online Linguistic Support;
- facilitate the integration of incoming mobile participants in the HEI;
- ensure an efficient mentoring and supervision arrangements of mobile participants;
- specific arrangements to ensure the quality of student traineeships in enterprises;
- ensure recognition of the educational components and related credits, issuing transcript of records and diploma supplements;
- support the reintegration of mobile participants and build on their acquired new competences for the benefit of the HEI and peers.

For more information visit pages 44 - 45 of the [2020 Programme Guide](#).

Using OS for insurance and visas

Insurance and visa costs for participants can be covered by OS. The sending HEI must verify that outgoing students are informed in advance about the situation in the host country in terms of insurance and have sufficient insurance coverage. For student traineeships, normally it is the receiving organisations responsibility to provide insurance, or cover the cost of insurance. However, if it is not possible, it is up to the sending institution to determine whether the cost of insurance can be covered by OS funds.

For further information about insurance please see page 10 of the [2020 Programme Guide](#).

11.3. Calculating Travel

By default, the place of origin is understood as the place where the sending organisation is located and the place of the venue as the place where the receiving organisation is located. If a different place of origin or venue is reported, the beneficiary must provide the reason for this difference.

In case no travel took place, or it was funded from other EU sources than Erasmus+ (e.g. a mobility participant is already at the place of the venue in relation to another activity than the one funded from the Agreement), the beneficiary must report that situation accordingly in

Mobility Tool+ for each mobility concerned. In this case, no grant support for travel will be awarded.

If a staff member undertakes two separate mobilities in two different countries (e.g. France and Spain) without returning to the home location, the travel for the first mobility is calculated based on the distance between the home location and the first mobility location (e.g. France). The travel grant for the second mobility is based on the distance between the location of the first mobility and the second (e.g. France to Spain). An explanation in Mobility Tool+ should be added in the field "Comments for a different location" to justify that a different distance band is used.

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

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

11.4. Proof of payment

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

12. Reporting

The HEI must show that reported activities have taken place, but is not required to show details of each item of expenditure (though thorough records should be kept at all times to allow for the possibility of being selected for audit).

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

12.1. Reporting deadlines from the HEI to the NA

To be completed by HEI for 24 month and 36 month agreements		
Interim Report	Contracted period; to include all confirmed and projected students/staff	24 & 36 month projects: 31.07.2021
To be completed by HEI for 24 month agreements		

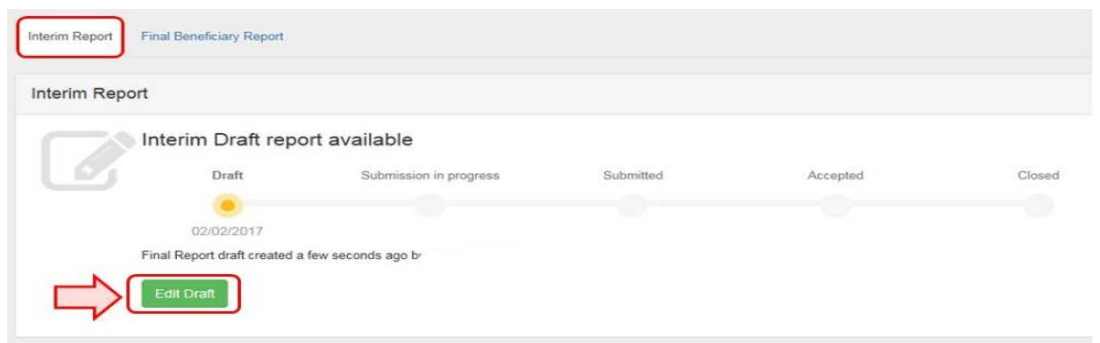
Beneficiary Final Report	Narrative report to demonstrate the qualitative and quantitative aspects of the project.	29.09.2022 60 days from project end date.
To be completed by HEI for 36 month agreements		
Beneficiary Final Report	Narrative report to demonstrate the qualitative and quantitative aspects of the project.	29.09.2023 60 days from project end date.

12.2. Interim Report

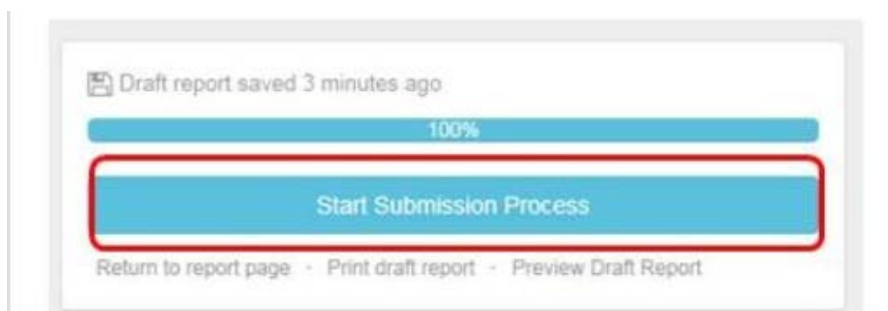
All HEIs are required to submit an 'Interim Report' during the lifetime of their project and no later than 31 July 2021.

For this report you would need to ensure that all mobilities that have taken place, as well as those that are yet to take place until the end date of the project, are recorded onto Mobility Tool+

To submit this report, you would need to go to the "reports" tab on Mobility Tool+ and you will see interim/progress report. You will need to click the "Edit Draft" button as per below screenshot:

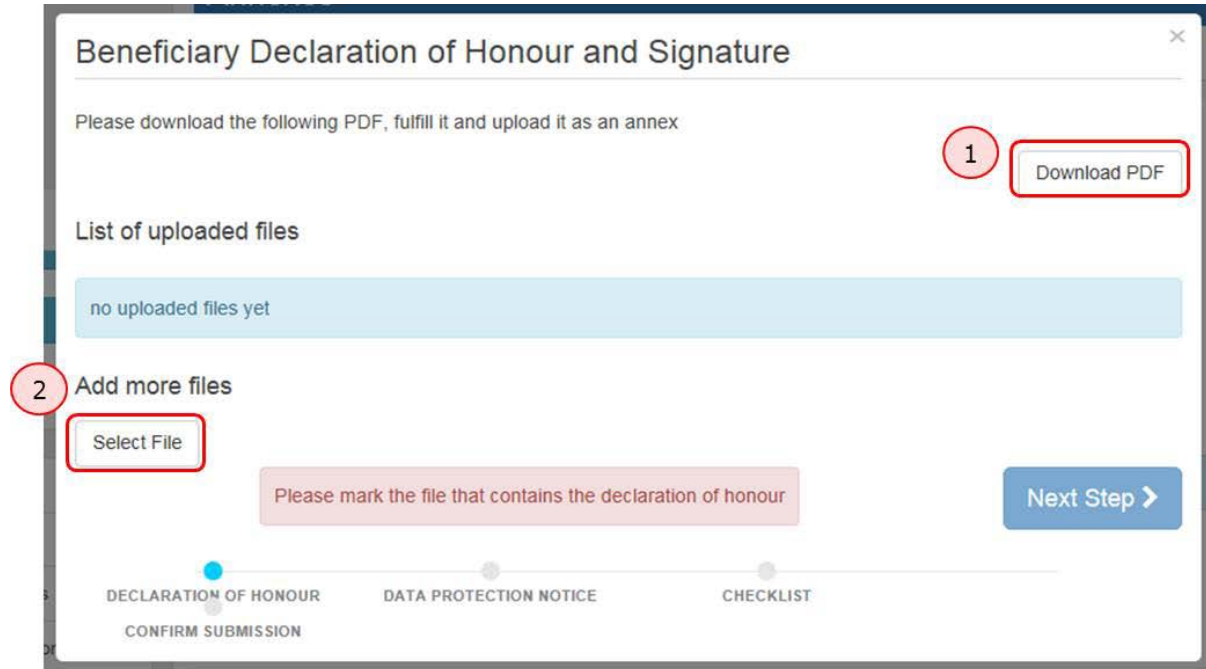


You will then need to complete the interim report. In the report you will see information about the partner organisations, overview of activities, and budget. In the final section you will be asked if you are requesting a further pre-financing payment, you will need to select yes. Once you have completed the report you will need to click "start submission process" as per below:

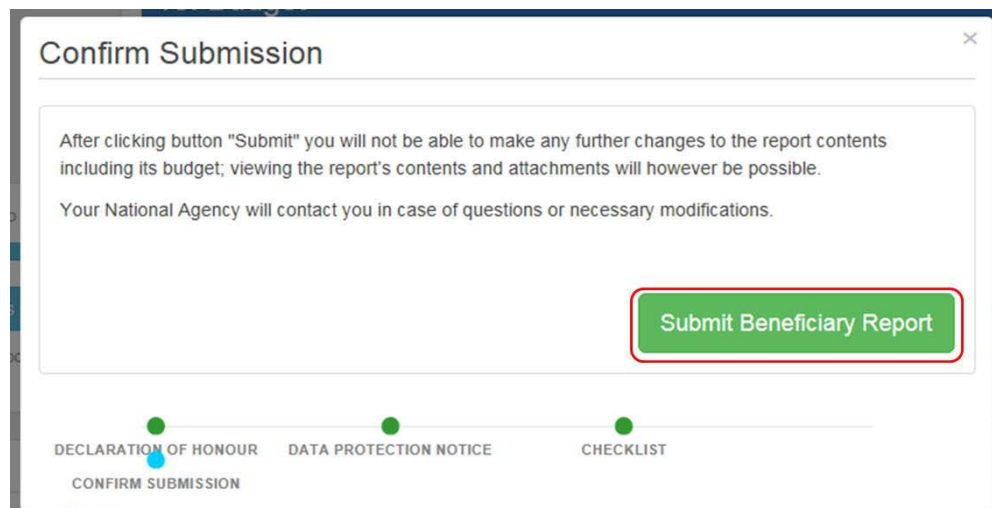


A pop-up screen will be displayed- click "Download PDF" button in order to download and save the Declaration of Honour. After you have printed and signed the Declaration of Honour

with a wet signature you need to click “Select File” in order to attach the document to the report as per the below screenshot.



Once the file is attached, click the “contains the declaration of honour” link to mark that the file contains the Declaration of honour. Once you have done this you should then be able to click “next step”. You will then need to read and accept the Data Protection notice. After this, please complete the checklist by clicking the “Not Done” buttons. Once everything is marked as ‘Done’ you will need to click ‘next step’. You should then see the below and be able to click “submit beneficiary report”.



Interim report outcome

In so far as the interim report demonstrates that at least 70% of the first pre-financing payment has been used, the interim report will be considered as a request for a further pre-financing payment and must specify the amount corresponding to 40% of total grant.

Where the interim report shows that less than 70% of the first pre-financing payment has been used, the beneficiary must submit a further interim report once at least 70% of the amount of the first pre-financing payment has been used, which will be considered as a request for a further pre-financing payment and must specify the amount corresponding to 40% of the total grant.

Where the interim report shows that the beneficiary will not be able to use the maximum grant amount as specified in Article I.3.1 of the grant agreement, 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 payment, recover the excess amount from the beneficiary.

Following approval of the report, UK NA will pay to the beneficiary the further pre-financing payment within 60 days from the reporting deadline, provided that all interim reports were submitted in timely fashion and no later than 31 July 2021. Regular (monthly) updating of Mobility Tool+ and reporting by set deadline are contractual obligations. Prior to the interim report deadline, the UK National Agency reviews Mobility Tool+ to determine the extent to which beneficiaries have completed their interim reports ahead of the reporting deadline and to determine the most appropriate cause of action.

12.3. Final Report

All HEIs are required to submit a final report via the Mobility Tool+ at the end of every project. The report will include a narrative report to demonstrate the qualitative aspects of the project implementation in addition to the quantitative data. **The final report must be submitted within 60 days of the project end date (which can be found in Article 1.2.2 of the Grant Agreement). The Mobility Tool+ remains fully open during the reporting period, however, no changes to project records in Mobility Tool+ will be possible past the final report deadline.**

The final report is considered as the beneficiary's request for **payment of the balance** of the grant:

The payment of the balance reimburses or covers the remaining part of the eligible costs incurred by the beneficiary for the implementation of the project. The NA determines the amount due as the balance by deducting the total amount of pre-financing already made from the final amount of the grant.

If the total amount of earlier payments is greater than the final amount of the grant determined in accordance with the Grant Agreement, 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 determined in accordance with the Grant Agreement, the NA must pay the balance within **60 calendar days** from when it receives the documents as specified in the Grant Agreement.

Payment following a report is subject to the approval of the request for payment of the balance and of the accompanying documents. Their approval does not imply recognition of the compliance, authenticity, completeness or correctness of their content. The amount to be paid may, however, be offset, without the beneficiary's consent, against any other amount owed by the beneficiary to the NA, up to the maximum amount of the grant.

For more information please refer to your Grant Agreement – Special Conditions.

Scoring of the Beneficiary Final Report

The narrative final beneficiary reports will be assessed by experts who have completed relevant assessors training and in line with the EC's 2020 Erasmus+ Assessment criteria for final beneficiary reports Guidelines. The maximum number of points that can be awarded is 100. Projects that are awarded over 75 points are considered very good to excellent and the results should be disseminated more widely.

Projects awarded between 50 to 75 points are considered average to good. If a project is awarded below 50 points, there is serious cause for concern in relation to compliance with the ECHE and/or other implementation issues. Consequences of low scores are set out in the Grant Agreement, Annex III.

13. National Agency Monitoring Activities

The UK NA and the Commission will monitor the correct implementation of the ECHE by the beneficiary. In case the monitoring reveals areas for improvement, the beneficiary must establish and implement an action plan within the timeframe specified by the NA or the Commission. In the absence of adequate and timely remedial actions by the beneficiary, the NA may recommend to the European Commission to suspend or withdraw the ECHE in accordance with the provisions set in the Charter.

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

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

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

13.1. Documentary Evidence

In accordance with Article II.27 of Annex I of the Agreement, the beneficiaries may be subject to checks and audits in relation to the Agreement including both inbound and outbound mobility. Checks and audits aim at verifying whether the beneficiaries managed the grant in respect of the rules set out in the Agreement, in order to establish the final grant amount to which the beneficiaries are entitled.

For final report check and desk checks, the coordinator must supply to the NA copies of supporting documents specified in the section 1.2 (including supporting documents from the other beneficiaries) to the NA, unless the NA makes a request for originals to be delivered. The NA must return original supporting documents to the beneficiary upon its analysis thereof. If the beneficiary is legally not authorised to send original documents for final report or desk checks, the beneficiary concerned may send a copy of the supporting documents instead.

The beneficiaries may be requested by the NA to provide additional supporting documents or evidence that are typically required for another type of check, as specified in article II.27 of the General Conditions.

13.2. Feedback from Audit Visits Carried Out by the NA

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

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

13.3. Repayment of Grant Monies

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

13.4. Practicalities for Audit Visits Carried Out by the NA

The Erasmus+ Co-ordinators at HEIs selected for visits will be contacted in advance to agree a date and will be advised of areas to be covered. A sample list of mobilities to be examined will normally be given in advance of the visit. To aid the process HEIs should prepare copies of the documentation as described in section 13.1 above.

13.5. Appeals

If you wish to appeal a decision made by the UK National Agency in relation to your Erasmus+ application for funding or grant agreement, you must follow the appeals procedure outlined on our website. Please note that you may only appeal if you believe the UK National Agency has not followed the correct procedures as set out in the relevant Commission Call for Proposals or in the National Agency's own published guidance.

14. Exceptions

If, with good reason, an HEI cannot comply with any EC or NA requirements, they should contact the NA as soon as possible. In all cases, the NA reserves the right not to accept the justification offered.

15. Useful Links

- [UK National Agency website](#)
- [UK National Agency – Manage your grant, HE Projects](#)
- [European Commission Erasmus+ website](#)
- [Erasmus+ National Agencies contact details](#)
- [Mobility Tool+](#)
- [Erasmus Charter for Higher Education \(ECHE\)](#)
- [ECHE Annotated Guidelines](#)
- [Organisation Registration system](#)
- [EC Distance Calculator](#)
- [Mobility Tool+ Guidance](#)
- [EuroPass website](#)
- [Erasmus+ Projects Results Platform](#)
- [Foreign travel advice](#)

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