# Erasmus+

## Budget and Duration

## Budget Allocation 2015
### (in Million €)

| Region | Indicative budget Million € |
|---|---:|
| 1   Western Balkans | 12,67 |
| 2   Eastern Partnership countries | 13,66 |
| 3   South-Mediterranean countries | 28,06 |
| 6   Asia | 33,46 |
| 7   Central Asia | 8,68 |
| 8   Latin America | 12,26 |
| 9   Gulf countries | 1,85 |
| 10  South Africa | 3,42 |
| TOTAL | 114,06 |

# Erasmus+

## Budget and Duration-Overview

**Duration 24 or 36 Months**

**Min. 500,000 Euros - Max. 1,000,000 Euros**

Excluding mobility strand

**Real Costs and Unit Costs**

**5 Budget Headings**

# How to calculate the budget -Categories

| | |
|---|---|
| **Staff costs** (max 40%) | **4 Staff Categories** (Manager, Researcher/ Teacher/Trainer, Technician, Administrator) |
| **Travel costs** | **Students/staff from partners** in countries involved in the project from their place of origin to the venue of the activity and return. Activities and related travels must be carried out at **project beneficiaries organisation.** |
| **Costs of stay** | Subsistence, accommodation, local and public transport, personal or optional health insurance. |
| **Equipment** (max 30%) | Purchased exclusively for the benefit of HEIs in the Partner Countries |
| **Sub-contracting** (max 10%) | Exceptional for services related to competences that can't be found in the |

THE RULES
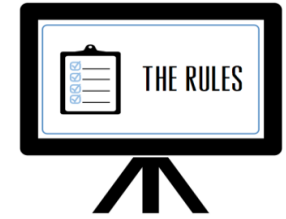
# How to calculate the budget -Methods

## 5 Budget Categories

- Staff        -        UC
- Travel        –        UC
- Cost of Stay – UC
- Equipment – RC
- Sub-contracting – RC

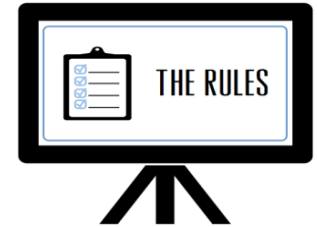## 2 Allocation / Justification Methods

Real Costs (RC)

Unit Costs (UC)

**Other types of costs** (ex.: dissemination, publishing, overheads costs, etc.) are not considered for the calculation of the grant.
>>> Expected to be **covered by co-funding.**

# Erasmus+

## How to calculate the budget –Unit Costs

➢ *A unit cost is a **fixed contribution** which is multiplied by the specific **number of units** to cover the costs linked to the implementation of a specific activity or task.*

➢ **EU Grants** : 2 important principles.
   - ➢ Non profit
   - ➢ Co-funding

➢ How to respect these principles under a "*unit cost*" approach?

➢ **E+ Unit Cost amounts** are the result of a statistical analysis carried out on real project costs from previous generation of programmes (LLP, Erasmus Mundus, Jean Monnet, Tempus, etc.)

➢ **For CBHE,** the simulation carried out on former Tempus projects showed that "*statistically*" the combination of real and unit costs corresponded +/- to 90% of their total eligible costs.

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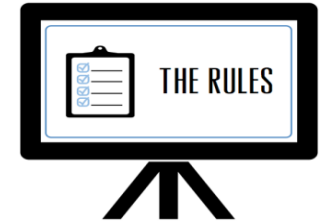
# How to calculate the budget –Unit Costs

➢ **Real costs**: How did you **use** the grant ?

=> **input** based

=>Expenses incurred, supporting documents

➢ **Unit costs**: what did you **achieve** with the grant ?

=>**output** based

=>No need to prove the actual expenditure but you need to show the "triggering event" (i.e.: the fact the activity was indeed properly implemented (e.g. teaching, training)

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**How to calculate the budget – Unit Cost**

**Unit Costs**

Grant **Allocation**

*Volume (/nature) of activities proposed in the application*

Grant **Justification**
(final report)

*Eligibility verification of the "triggering event"*

**Use** of the Grant

*internal decision of the partnership (in coherence with application)*

# Erasmus+

## How to calculate the budget - STAFF COSTS

| Financing mechanism for staff costs (see Programme Guide page 158, 160 and page 161 Table A and B) | Amount | |
|---|---|---|
| **Unit costs**<br><br>**Subdivided in 4 categories and country groups**<br>**(4 groups for Programme and 4 groups for Partner Countries)** | per manager involved per day | Max. 40% of the total grant |
| | per researcher/ teacher/trainer involved per day | |
| | per technician involved per day | |
| | per administrative staff involved per day | |

# How to calculate the budget Travel/Cost of Stay

## Costs of Stay
**(see Programme Guide page 159)**

## Travel Costs
**(see Programme Guide page 158)**

for eligible activities please refer to page 287-288

| DAYS | STAFF | STUDENTS |
|---|---|---|
| 1-14 | 120€ | 55€ |
| 15-60 | 70€ | 40€ |
| 61 - 180 | 50€ | n.a. |

| Distance Bands | Unit Cost |
|---|---|
| 100-499 km | 180€ |
| 500-1999 km | 275€ |
| 2000-2999 km | 360€ |
| 3000-3999 km | 530€ |
| 4000-7999 km | 820€ |
| 8000 km and more | 1.100€ |

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# How to calculate the budget - Travel/Cost of Stay

*http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm*

**Example 1:**
**Staff Trip: From Paris to Bxl**
**(308 KM)**
**Duration 2 days**
**Real expense:**
**Travel Costs :120 €**
**Hotel + Subsistence Costs (250 €)**
**Total real expenses: 370 €**

**Calculation (unit-costs):**
**Travel Costs: 180 €**
**Costs of Stay: 2 x 120 € =240 €**
**Total unit-costs: 420 €**

**Example 2 :**
**Staff Trip: From Paris to Berlin**
**(771 KM)**
**Duration 2 days**
**Real expense:**
**Travel Costs :250 €**
**Hotel + Subsistence Costs (300 €)**
**Total real expenses: 550 €**

**Calculation (unit-costs):**
**Travel Costs: 275 €**
**Costs of Stay: 2 x 120 € =240 €**
**Total unit-costs: 515 €**

THE RULES

**THE RULES**

**How to calculate the budget**

**Special Mobility Strand**

*Max. 80% of the total EU grant awarded for the joint or structural project (excluding the mobility strand)*
*(see Programme Guide page 162-165)*

**Travel costs**

**Cost of Stay**

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THE RULES

# How to calculate the budget -

## Travel Costs

**Special Mobility Strand**

| Distance Bands | Unit Cost |
|---|---|
| 100-499 km | 180€ |
| 500-1999 km | 275€ |
| 2000-2999 km | 360€ |
| 3000-3999 km | 530€ |
| 4000-7999 km | 820€ |
| 8000 km and more | 1.100€ |

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**How to calculate the budget
STUDENTS - Cost of Stay**

**Special Mobility Strand**

## *Costs of Stay €/Month*

### Students from Programme

| Irrespective of hosting country |
|---|
| **650 €** |

### Students from Partner countries

| Country group 1 hosting | Country group 2 hosting | Country group 3 + 4 hosting |
|---|---|---|
| **850 €** | **800 €** | **750 €** |

# How to calculate the budget
## STAFF Costs of Stay

**Cost of Stay €/Day**

**Staff from Partner Countries**

**Cost of Stay €/Day**

**Staff from Programme Countries**

| Days | Country group 1 hosting | Country group 2 hosting | Country group 3 hosting | Country group 4 hosting |
|------|------|------|------|------|
| 1-14 | 160 € | 140 € | 120 € | 100 € |
| 15-60 | 112 € | 98 € | 84 € | 70 € |

| Days | Irrespective of hosting country |
|------|------|
| 1-14 | 160 € |
| 15-60 | 112 € |
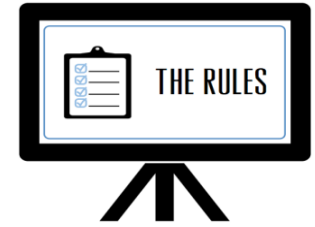
# Partnership Agreement

- **Mandatory**

- **To be submitted to the Agency within 6 months of the signature of grant contract (Signed by the legal rep.)**

- **Joint** *(one doc signed by all partners)* **or Bilateral** *(partner A + coordinating inst.)*

- **Template** *available to be adapted to specific needs of partnership*

- **Comprehensive** *: covering* **all aspects** *of the project:*
  - **The partners role and responsibilities;**
  - **Financial Management;**
  - **Project Management;**
  - **Project Quality Assurance;**
  - **Student issues**
  - **Decision/Conflict resolution mechanisms**

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# Erasmus+

## Application and Selection procedure
## Indicative roadmap for selection process

| Steps | Date |
|---|---|
| Publication of the Call for Proposals | Oct. 2014 |
| Deadline for submission of applications | 10 February 2015 |
| Expert assessment | March-April 2015 |
| Consultation of local/regional stakeholders | May-June 2015 |
| Award Decision | July 2015 |
| Notification of applicants and Publication of results on EACEA web site | July-August 2015 |
| Preparation and signature of grant agreements | August –September 2015 |
| Start of Eligibility Period | 15 October 2015 |

# How and what do I submit? - General

**When? How? Where?**

*One deadline - One-phase submission - on-line to EACEA*
*Application form = unique reference information for the*
*submission deadline.*

**What?**

➢ **Specific application form:**

**eForm**: project data – parts A, B, C

+ **compulsory** annexes:

- ✓ **Detailed project description** (Word doc) – parts D, E, F, G, H, I, J
- ✓ **Budget tables** (Excel doc)
- ✓ **Declaration of Honour+ Mandates** (in one single PDF doc)

**Pre-filled with info from Participant Portal - PIC**

# How and what do I submit ?
## Application form - structure & contents

**eForm** (PDF Adobe doc)

A.      Identification of the applicant and other partners
B.      Description of the project (summary information)
C.      Specific information related to CBHE

**Detailed project description** (Word doc. Attached to eForm)

D.      Quality of the project team and the cooperation
         arrangements
E.      Project characteristics and relevance
F.      Quality of the project design and implementation
G.      Impact, dissemination and exploitation, sustainability;
         LFM; Workplan
H.      Work packages
I.      Special Mobility Strand (where applicable)
J.      Other EU Grants

**What is assessed?
Assessment of CBHE Projects**

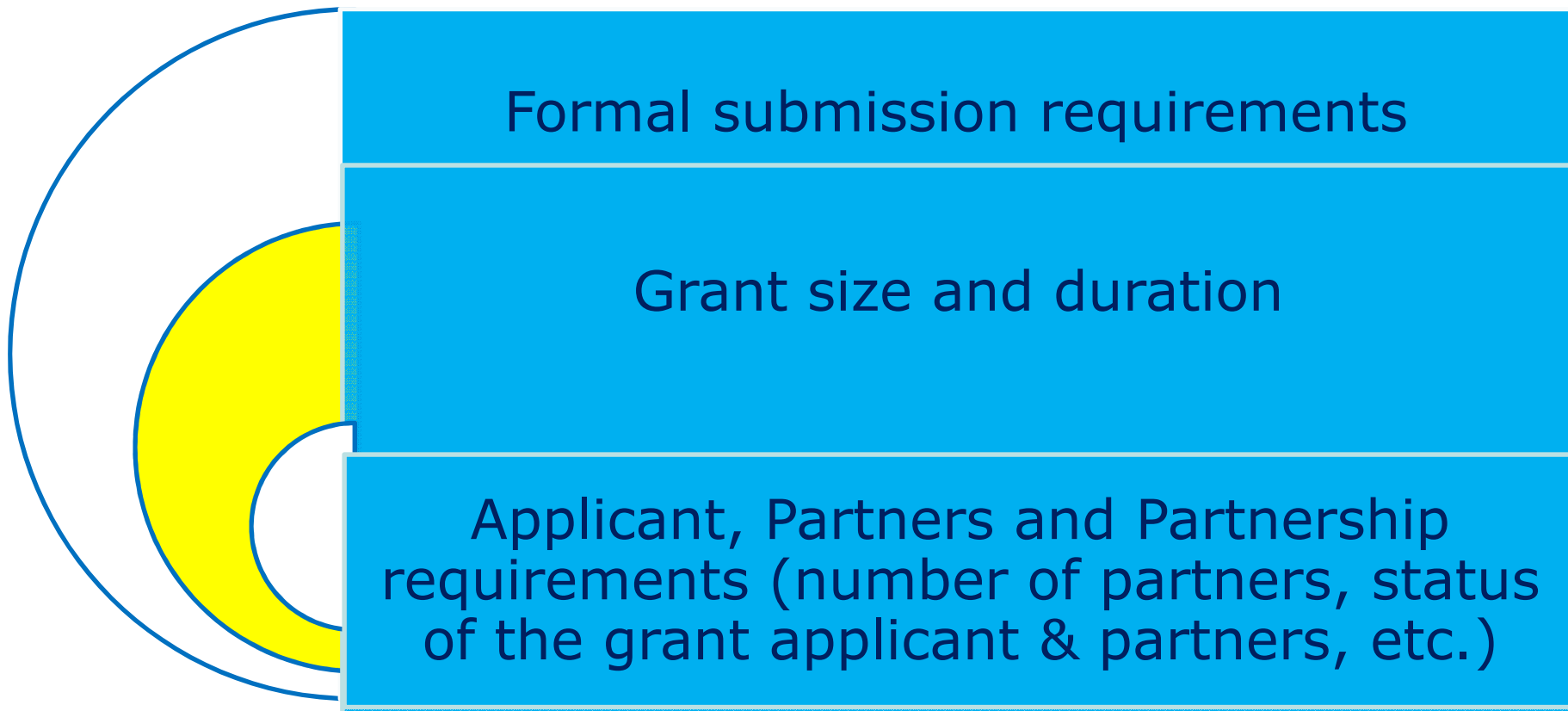**Eligibility
Criteria**

**Exclusion
&
Selection
Criteria**

**Award
Criteria**

# Erasmus+

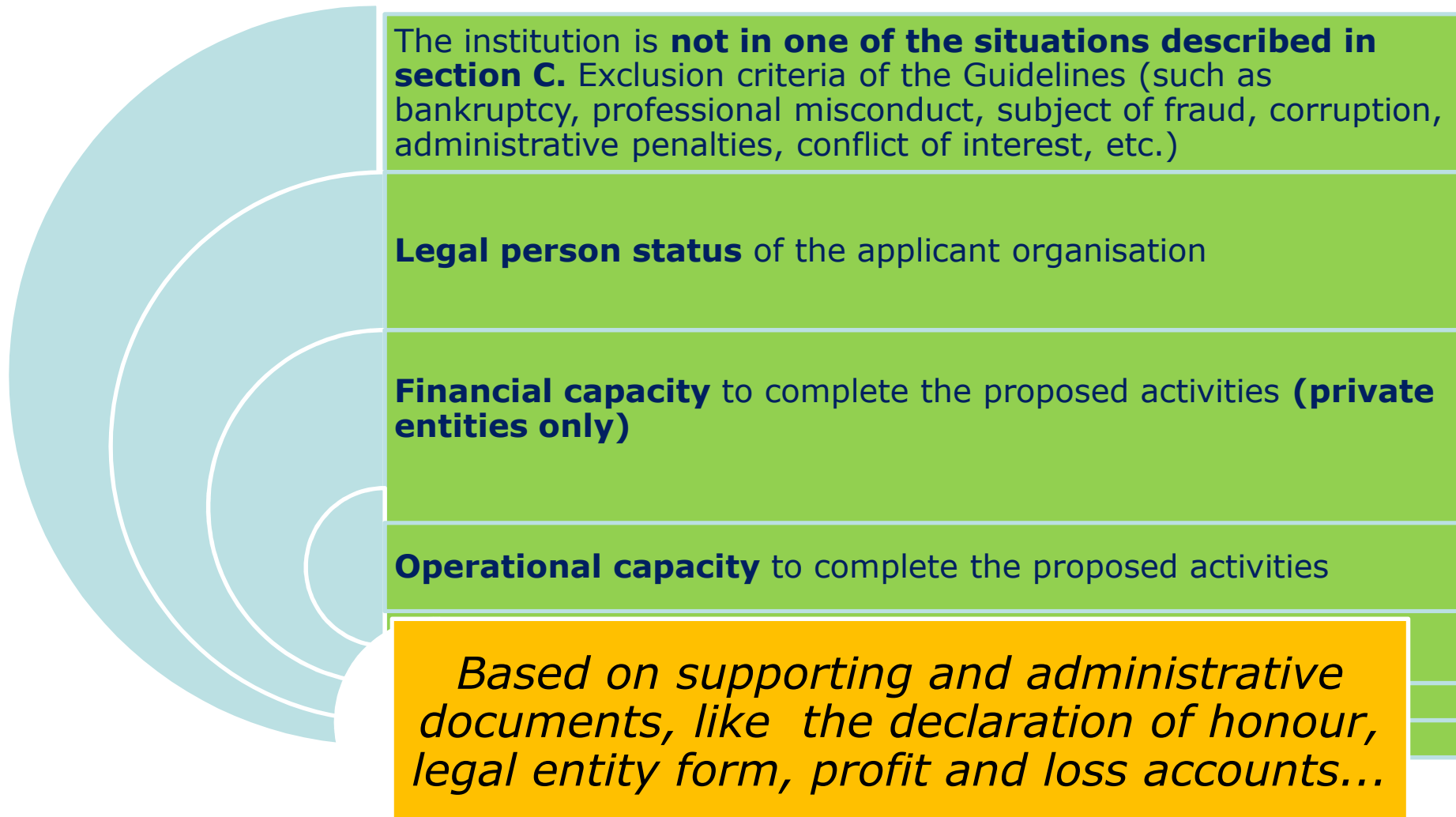## What is assessed? Eligibility Criteria

Formal submission requirements

Grant size and duration

Applicant, Partners and Partnership requirements (number of partners, status of the grant applicant & partners, etc.)

# Erasmus+

## What is assessed? Exclusion and Selection Criteria

The institution is **not in one of the situations described in section C.** Exclusion criteria of the Guidelines (such as bankruptcy, professional misconduct, subject of fraud, corruption, administrative penalties, conflict of interest, etc.)

**Legal person status** of the applicant organisation

**Financial capacity** to complete the proposed activities **(private entities only)**

**Operational capacity** to complete the proposed activities

*Based on supporting and administrative documents, like the declaration of honour, legal entity form, profit and loss accounts...*

# What is assessed? Award Criteria

**Relevance**
(30 points)

**Quality of Design + Implementation**
(30 points)

**Quality of Team + Cooperation** arrangements
(20 points)

**Impact and Sustainability**
(20 points)

**To be considered for funding, proposals must score
at least 60 points in total and - out of these points at least 15 points for
"Relevance"**

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## DEFINITION

- *The project contributes to the achievement of the policy objectives of the participating partners*

- *It is based on and addresses real needs & problems of the target groups*

## CONTENT

- How clearly the project addresses the Programme **objectives** and **priorities (annual, thematic, geographical priorities)**
- **Needs analysis** and presentation of **specific problems** addressed
- Definition of **target groups**
- What is **innovative** or complementary to other initiatives
- How the **project was prepared**

## What is assessed ?
## Award Criterion 2 -
## Quality of Design and Implementation

**DEFINITION**

- *The activities proposed are appropriate to achieve the specific and wider objectives*
- *It uses the most appropriate methodology*
- *It demonstrates a logical and sound planning capacity*

**CONTENT**

Description of the project as a whole, including:

- **specific objectives**
- **activities**, expected **outcomes**, wider and specific objectives
- academic **content** and pedagogical **approach**
- **involvement** of academics, students and stakeholders at large
- **quality control** processes

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# Erasmus+

## DEFINITION

- *The partnership includes all the skills, recognised expertise and competences required*

- *Suitable distribution of tasks*

- *Sound communication and coordination*

## CONTENT

- Presentation of the **partners competences** and **roles** in the project

- Description of any **complementary skills**, expertise and competences directly relating to the planned project activities

- ensure **regional dimension**

- Planned measures to ensure effective **communication**

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## DEFINITION

- *Information/outcomes of the project are made available to groups not directly involved (multiplier effect)*
- *Optimal use of the results during & beyond the project lifetime*
- *Expected impact will be substantial and sustainable in the long term (financial, institutional and policy level)*

## CONTENT

- Expected **impact** at different levels
- **Dissemination strategy**: outputs to be disseminated, target groups, dissemination tools & activities
- **Measures** planned to ensure the sustainability of project outcomes and outputs at **three levels**: financial, institutional and political
- **Evidence of impact** on HE at institutional / national level in PCs

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**Special Mobility Strand**

**What is assessed?**
**Quality**
**Design & Implementation**

**Additional Award Criteria**

**DEFINITION**

- *Full contribution to the achievement of the related project and added value of the project*
- *Transparent procedures selection of participants*
- *Quality systems*

**CONTENT**

Relevance of the mobility strand for the project

Well-**articulated** with the project; demonstrated **added value**

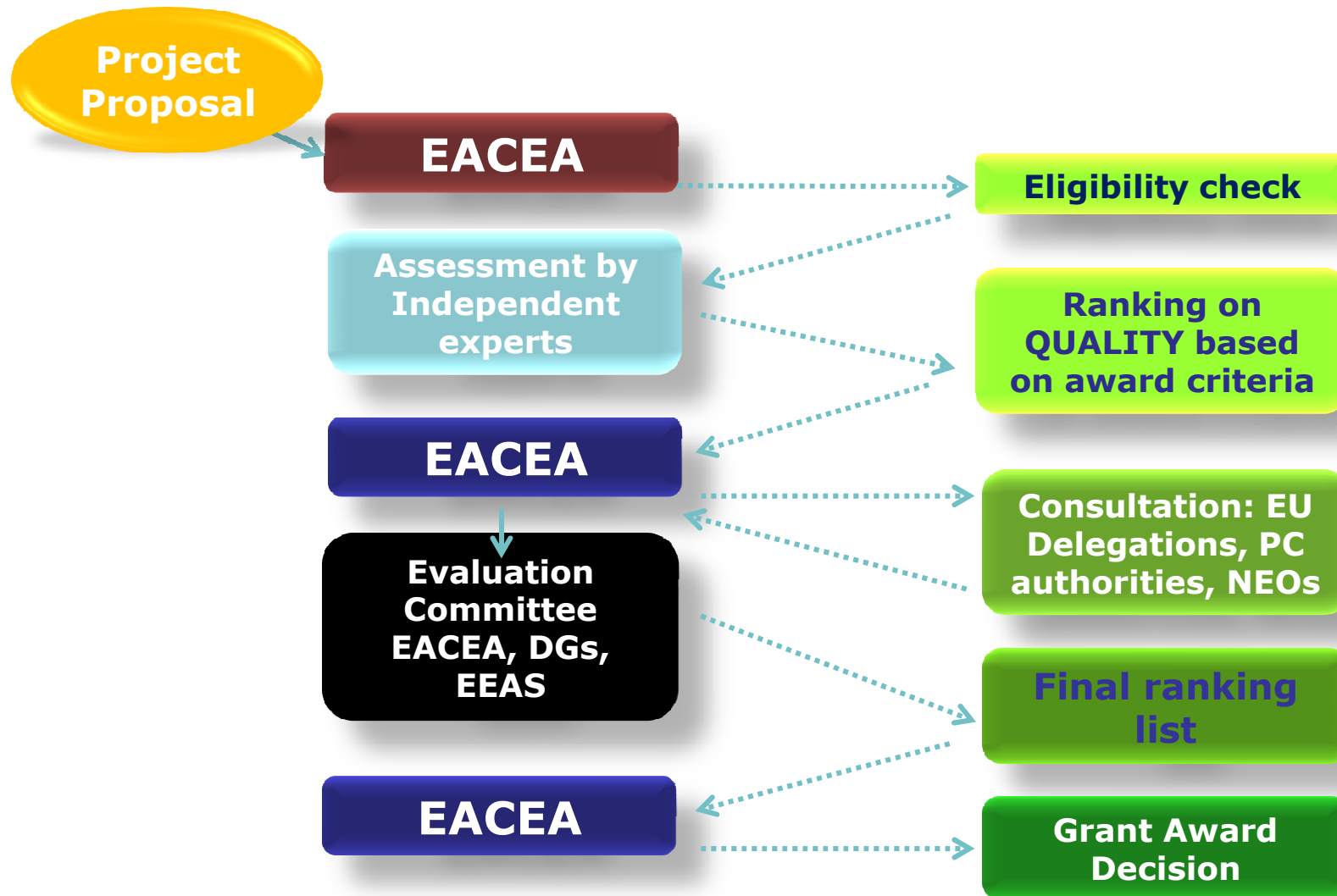Demonstration of positive **impact** for individual and institutions

**Validation and recognition** at institutional level

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## What is assessed? - Selection Process

**Project Proposal**

**EACEA** → Eligibility check

**Assessment by Independent experts** → Ranking on QUALITY based on award criteria

**EACEA**

**Evaluation Committee EACEA, DGs, EEAS** → Consultation: EU Delegations, PC authorities, NEOs

Final ranking list

**EACEA** → Grant Award Decision

# Erasmus+

**EACEA takes decision based on:**

**Evaluation Committee's recommendation** taking into account:

- ranking list on quality established by external experts
- the results from the consultation process
- the budget available for each region
- the need to achieve a geographical balance within a region
- sufficient coverage of the priorities

## Local Support

### *Centrally managed (EACEA) but local support :*

**International E+ Contact Points (ICPs) in Programme Countries**

https://eacea.ec.europa.eu/erasmus-plus/contacts/international-erasmus-plus-contact-points_en

**National Erasmus+ Offices (NEOs) in certain Partner Countries**

https://eacea.ec.europa.eu/erasmus-plus/contacts/national-erasmus-plus-offices_en

**Other useful links:**
**Erasmus+ website - EACEA**

http://eacea.ec.europa.eu/erasmus-plus_en

**Programme Guide  Version 1(2015): 01/10/2014**

http://ec.europa.eu/programmes/erasmus-plus/documents/erasmus-plus-programme-guide_en.pdf

*Relevant pages in the Programme Guide (which need to be consulted in the context of the Programme Guide in general): PP 146-165; PP 287-295*

**Erasmus+ website – EU Commission**

http://ec.europa.eu/programmes/erasmus-plus/index_en.htm

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## Continuity with the past but new elements:

**TEMPUS**

- **Partnership** criteria and compulsory Partnership agreement

- **Geographical scope** (28 -> 33 Programme Countries AND 27 -> 150 Partner Countries)

- Special **Mobility Strand** & related requirements

- Introduction of **Unit Costs**

- **Size of Grant** - 500.000-1 Million € (excluding the mobility strand)

- **Participant Portal** (registration)

**Erasmus+**

## Continuity with the past but new elements:

**ALFA**

- **Management** of the action by EACEA
- Different **partnership** requirements (smaller) and introduction of a compulsory partnership agreement
- **Duration** (24 or 36 months)
- a wider **geographical scope** (from 28 EU countries to 33 programmes countries and from 18 LA countries to more than 150 PCs).
- Introduction of **unit costs**
- **No more contingency reserve**
- **No more obligation to spend 70%** of the budget in LA or for the benefit of LA partners
- Smaller size of the **grant** (in particular max amount reduced from max. 3M to 1 million)
- **Application procedure** (one single step procedure)
- Compulsory **registration** of the participating institutions in the participant portal (PIC)

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**NEW**

## Continuity with the past but new elements:

**EDULINK**

- **Management** of the action by EACEA

- Different **partnership** requirements (requirement of Programme Country Partners) and introduction of a compulsory partnership agreement

- a wider **geographical scope** (33 programmes countries and more than 150 PCs)

- Introduction of **unit costs**

- **Application procedure** (one single step procedure)

- Compulsory **registration** of the participating institutions in the participant portal (PIC)

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