

ANNEX III – FINANCIAL AND CONTRACTUAL RULES

[This Annex refers to **Key Action 1** – school education, vocational education and training, higher education, adult education and youth, for **monobeneficiary and multibeneficiary** grant agreements.]

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I. RULES APPLICABLE TO BUDGET CATEGORIES BASED ON UNIT CONTRIBUTIONS

I.1 Conditions for eligibility of unit contributions

Where the grant takes the form of a unit contribution, the number of units must comply with the following conditions:

- the units must be actually used or produced in the period set out in Article I.2.2 of the Special Conditions;
- the units must be necessary for implementing the Project or produced by it;
- the number of units must be identifiable and verifiable, in particular supported by records and documentation specified in this Annex.

I.2 Calculation and supporting documents for unit contributions

A. Travel [HE: Support] [DiscoverEU: Cost]

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 the Erasmus+ Programme (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 the Erasmus+ reporting and management tool for each mobility concerned. In this case, no grant support for travel will be awarded.

- (a) Calculation of the grant amount for travel costs: the grant amount is calculated by multiplying the number of participants [For VET, AE, SE, accompanying persons] [For Youth: accompanying persons, facilitators and group leaders] [for YPA: accompanying persons, decision makers and facilitators] per distance band, by the unit contribution applicable to the distance band concerned and type of travel (standard or green), as specified in Annex IV of the Agreement. The unit contribution per distance band represents the grant amount for a return travel between the place of departure and the place of arrival. In case of green travel modes (train, bus, shared car), the green travel unit contributions apply, otherwise the standard travel unit contributions apply.

[For HE KA131: Unit contributions for travel are applicable for any staff mobility. For student mobility, unit contributions for travel are applicable a) for sending institutions from outermost EU Member States and third countries associated to the Programme and regions (outermost regions, Cyprus, Iceland, Malta) and Overseas Countries and Territories, b) for participants with fewer opportunities on short-term student mobility and c) for participants going to third countries not associated to the Programme, except to third countries not associated to the Programme from Region 13 and 14. In the latter case c), beneficiaries may decide not to provide a travel unit contribution, except for participants with fewer opportunities. The criteria for the non-provision have to be fair (ensuring equal treatment), transparent, documented and published on the institution's website.]

[For HE KA171: Unit contributions for travel are applicable for any staff and student mobility.]

[For Youth: In the case of itinerant activities, the grant amount is calculated by multiplying the number of participants per the distance band corresponding to the total of sum of the distances between individual venues.]

For the establishment of the distance band applicable, the beneficiary must indicate the distance of a one-way travel using the on-line distance calculator available on the Commission's website at:

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

The beneficiary will calculate in the Erasmus+ reporting and management tool the grant amounts for travel based on the applicable unit contribution rates.

[For DiscoverEU: The costs for the travel pass are based on real costs. The travel pass contains the possibility to travel for 7 days within one month using the transport mode with the overall lowest greenhouse gas emissions. It equally includes the new DiscoverEU discount card. One pass per participant and per accompanying person, if applicable, using the same means of transport as the participant.

In case the travel where the country of origin is not directly linked to the train system on continental Europe and additional travel, by other means of transport, is needed to reach the country where the mobility starts, the additional travel can be topped-up through a contribution to unit costs. The distance band is applicable as well as green travel where appropriate.

- (b) Triggering event: the event that conditions the entitlement to the grant is that the participant has actually undertaken the activity.
- (c) Supporting documents

[For Youth: Proof of attendance of the activity in the form of a declaration signed by the participant, by the receiving organisation, and specifying the name of the participant, the purpose of the activity, as well as its starting and end date.]

[For DiscoverEU: Proof of attendance of the activity in the form of a declaration signed by the participant and accompanying person, if applicable, specifying the name of the participant/accompanying person, the purpose of the activity, as well as its starting and end date.] Once the Youthpass is made available for DiscoverEU : proof of attendance of the activity in the form of Youthpass or another type of document specifying the participant's name and learning outcomes, as well as the starting and end date of the activity. In case accompanying persons have supported the participants during the activity, their names and duration of stay shall also be included. The supporting documents must be signed by the sending organisation and the participant.

[For SE/AE:

- Individual activities: proof of attendance of the activity in the form of Europass Mobility or another type of document specifying the participant's name and learning outcomes, as well as the starting and end date of the activity. In case accompanying persons have supported the participants during the activity, their names and duration of stay shall also be included. For invited experts, the list of learning outcomes will be replaced with a learning programme provided by the expert. The supporting documents must be signed by the hosting organisation and the participant. [If required by the NA: Additionally, a signed grant agreement between the beneficiary organisation and the participant will be required as supporting documentation for the following activity types: [NA to complete]]
- Group activities: proof of attendance of the activity in the form of a participants list (including accompanying persons) and the implemented learning programme (including the schedule of the activities, the methods used, the achieved learning outcomes, as well as the starting and end date of the activity. The supporting documents must be signed by the sending and hosting organisation. For activities organised at a seat of an institution of the

European Union, the supporting documents must be signed by the two sending organisations.]

[For VET: Proof of attendance of the activity in the form of Europass Mobility or another type of document specifying the participant's name and learning outcomes, as well as the starting and end date of the activity. For invited experts, the list of learning outcomes will be replaced with a learning programme provided by the expert. In case accompanying persons have supported the participants during the activity, their names and duration of stay shall also be included. The supporting documents must be signed by the hosting organisation and the participant. [If required by the NA: Additionally, a signed grant agreement between the beneficiary organisation and the participant will be required as supporting documentation for the following activity types: [NA to complete]]]

[For HE:

- (c) Supporting documents for staff: Proof of attendance of the activity in the form of a declaration signed by the receiving organisation, covering also the virtual components in case of blended mobility, and specifying the name of the participant, the purpose of the activity, as well as its confirmed starting and end date of the physical mobility activity.

Supporting documents for students: Documentary evidence issued by the receiving organisation, covering also the virtual components in case of blended mobility, and specifying:

- the name of the student,
- the confirmed start and end date of the physical mobility activity

in the following format:

- Transcript of Records (or statement attached to it) in the case of mobility for studies
 - Traineeship Certificate (or statement attached to it) in the case of mobility for traineeships.]

[For ALL] In addition, in case of use of sustainable means of transport (green travel): a declaration on honour signed by the person receiving the travel grant and the sending organisation will serve as supporting documentation. [For SE/AE: In group activities, a responsible accompanying person will sign the declaration on behalf of the group.]

Participants should be informed of their duty to keep the proof of travel (transport tickets) and to provide it to the beneficiary, if requested.]

B. Individual support

- (a) [For AE, SE, VET, Youth: Calculation of the grant amount: the grant amount is calculated by multiplying the number of days per participant and accompanying person [for Youth: including decision makers, group leaders and facilitators] by the unit contribution applicable per day for the receiving country concerned, as specified in Annex IV of the Agreement. Travel days may be added if relevant for a specific activity, and up to the limits specified in the Programme Guide.]

[For DiscoverEU: Calculation of the grant amount: the grant amount is calculated by multiplying the number of days per participant and accompanying person up to a maximum of 21 days.

Should the participant(s) travel(s) longer than 21 days but within the 30 days of the validity of the travel pass, the additional days are not covered by the DiscoverEU grant.]

[For HE: Calculation of the grant amount for students: the grant amount is calculated by multiplying the number of days/months of physical presence per student by the unit contribution applicable per day/month for the receiving country concerned as specified in Annex IV of the Agreement. Funded travel days may be added if relevant for a specific activity, and up to the limits specified in the Programme Guide.

In the case of incomplete months for long-term mobilities, the grant amount is calculated by multiplying the number of days in the incomplete month by 1/30 of the unit contribution per month including the top-up amounts.

Students and recent graduates with fewer opportunities participating in mobility must receive a top-up amount for fewer opportunities for individual support when they fulfil the eligibility criteria set at national level.

[For HE KA131 student mobility [NA to select if applicable]: In the case of higher education student mobility for traineeships between EU Member States and third countries associated to the Programme and to third countries not associated to the Programme from Region 13 and 14, the student and recent graduate must receive a monthly top-up amount for traineeships for individual support.

The top-up amounts for traineeships and fewer opportunities are cumulative for long-term student mobility between EU Member States and third countries associated to the Programme, and to third countries not associated to the Programme from Region 13 and 14.

In the cases where students and recent graduates do not receive the separate travel support budget category, they are entitled to receive funding for using sustainable means of transport as specified in the Programme Guide. For the supporting documents see the travel support section.]

Start and end dates will be counted as follows:

- The start date should be the first day that the student needs to be present at the receiving organisation (first course/first day at work/first day of welcoming event or language and intercultural courses).
- The end date should be the last day the student needs to be present at the receiving organisation (last day of the exam period/course/work/mandatory sitting period).

Calculation of the grant amount for staff: the grant amount is calculated by multiplying the number of physical presence of days per participant by the unit contribution applicable per day for the receiving country concerned as specified in Annex IV of the Agreement. Funded travel days may be added if relevant for a specific activity, and up to the limits specified in the Programme Guide.

In case of “partial zero-grant mobility” in higher education mobility supported by internal policy funds, participants have to receive individual support for the minimum mobility duration, with the exception of the fully non-funded mobility (“zero grant mobility”).

Changes in the period of stay for students and staff:

- If the expected period of stay is longer than the one indicated in the grant agreement, the beneficiary may:
 - Either amend the grant agreement during the mobility period to take into account the longer duration, provided that the remaining grant amount allows it.
 - Or agree with the participant during the mobility period that the additional number of days will be considered as a period of “zero-grant” (non-funded duration).

- The grant amount cannot be increased after the mobility is finished.
- If the confirmed period of stay is longer than the one indicated in the grant agreement, the additional days are to be considered a period of "zero-grant".
- For long-term student mobility: 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 the Erasmus+ reporting and management 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 the Erasmus+ reporting and management tool the period indicated in the grant agreement (i.e. the grant is not recalculated).]

[For ALL:

- In case of an interruption during the stay, the period of the interruption will not be counted when calculating the individual support grant. In case of interruption due to "force majeure", the participant must be allowed to continue the activities after the interruption (if possible within the conditions established in this Agreement).
 - In case of termination by the participant of the agreement with the beneficiary due to "force majeure", the participant must be entitled to receive the amount of the grant corresponding at least to the actual duration of the mobility period. Any remaining funds must be refunded to the beneficiary, except if agreed differently by both parties.
- (b) Triggering event: the event that conditions the entitlement to the grant is that the participant has actually undertaken the activity for the specified period.
- (c) Supporting documents:

[For SE/AE:

- Individual activities: proof of attendance of the activity in the form of Europass Mobility or another type of document specifying the participant's name and learning outcomes, as well as the starting and end date of the activity. For invited experts, the list of learning outcomes will be replaced with a learning programme

provided by the expert. In case accompanying persons have supported the participants during the activity, their names and duration of stay shall also be included. The supporting documents must be signed by the hosting organisation and the participant. [If required by the NA: Additionally, a signed grant agreement between the beneficiary organisation and the participant will be required as supporting documentation for the following activity types: [NA to complete]]

- Group activities: proof of attendance of the activity in the form of a participants list (including accompanying persons) and the implemented learning programme (including the schedule of the activities, the methods used, the achieved learning outcomes, as well as the starting and end date of the activity. The supporting documents must be signed by the sending and receiving organisation. For activities organised at a seat of an institution of the European Union, the supporting documents must be signed by the two sending organisations.]

[For VET: Proof of attendance of the activity in the form of Europass Mobility or another type of document specifying the participant's name and learning outcomes, as well as the starting and end date of the activity. For invited experts, the list of learning outcomes will be replaced with a learning programme provided by the expert. In case accompanying persons have supported the participants during the activity, their names and duration of stay shall also be included. The supporting documents must be signed by the hosting organisation and the participant. [If required by the NA: Additionally, a signed grant agreement between the beneficiary organisation and the participant will be required as supporting documentation for the following activity types: [NA to complete]]]

[For Youth: Proof of attendance of the activity in the form of a declaration signed by the participant and by the receiving organisation, specifying the name of the participant, the purpose of the activity, as well as its starting and end date.]

[For HE:

Supporting documents for staff: Proof of attendance of the activity in the form of a declaration signed by the receiving organisation, covering also the virtual components in the case of blended mobility, and specifying the name of the participant, the purpose of the activity, as well as its confirmed physical start and end date

Supporting documents for students: Documentary evidence issued by the receiving organisation, covering also the virtual components in case of blended mobility, and specifying:

- the name of the student,
- the confirmed physical start and end date of the mobility activity

in the following format:

- Transcript of Records (or statement (Certificate of Attendance) attached to it) in the case of mobility for studies.
- Traineeship Certificate (or statement (Certificate of Attendance) attached to it) in the case of mobility for traineeships.

Supporting documents for blended mobility and for the participation in blended intensive programmes: the regular documents as specified above have to be used.

Supporting documents for the top-up amount for fewer opportunities: Proof of meeting one national criterion. The use of a self-declaration is allowed as supporting document as part of the national criteria.]

(d) Reporting:

[For ALL: Participants [For Youth Exchanges: Group leaders] in mobility activities] [For YPA: unless de-selected by the beneficiary due to the limited scope/length of their participation in mobility activities] must provide their feedback in terms of factual information and their appreciation of the activity period, its preparation and follow-up. The participants must use the standard on-line questionnaire provided by the European Commission (the participant report) when submitting their feedback. [For YPA: Members of the informal group implementing the project shall fill in an online questionnaire regardless of whether they participated in a mobility activity or not. Insofar as the members of the informal group participated in one or several mobility activities, the on-line questionnaire filled by each of them shall cover the entire project, i.e. they shall not fill in separate questionnaires for each mobility activity.]

[For SE/AE: In case of group mobility activities, one of the qualified staff members leading the group will be asked to complete an on-line questionnaire for the same purpose.]

[For SE/VET/AE/HE: Participants who fail to submit their report may be required to partially or fully reimburse the financial contribution received from Erasmus+.]

C. Organisational support

[For VET, AE, SE, Youth (with the exception of YPA):

- (a) Calculation of the grant amount: the grant amount is calculated by multiplying the total number of participations in mobility activities by the unit contribution applicable, as specified in **Annex IV** of the Agreement. Accompanying persons [for Youth: group leaders, trainers, facilitators] and persons taking part in preparatory visits are not considered to be participants of mobility activities and are therefore not considered for calculation of the organisational support grant.]

[For HE

Calculation of the grant amount for mobility organisational support: the grant amount is calculated by multiplying the total number of participations in mobility activities (i.e. regardless of whether the same participant will have undertaken one or more mobilities) by the unit contributions applicable as specified in **Annex IV** of the Agreement.

[HE KA131: The total number of participations considered for the calculation of organisational support includes all students and staff undertaking outbound mobility, including those with a zero-grant from Erasmus+ EU funds for their entire mobility period, as well as invited staff from enterprises undertaking inbound mobility. The total number of persons considered for organisational support excludes persons accompanying participants at their activity.

Calculation of the grant amount for blended intensive programme organisational support: the grant amount is calculated by multiplying the total number of participants (learners) in the blended intensive programme, incoming through student study or staff training mobility activities, by the unit contribution applicable as specified in **Annex IV** of the Agreement and within the limits specified in the Programme Guide.]

[HE KA171: The total number of participations considered for the calculation of organisational support includes the number of students and staff undertaking inbound and outbound mobility registered in Annex II. The beneficiary may request additional organisational support to the NA for participants with a zero-grant from Erasmus+ EU funds. The total number of persons considered for organisational support excludes persons accompanying participants at their activity and additional mobilities that may be organised by transferring funds between budget categories.]

[For ALL:

(b) Triggering event: the event that conditions the entitlement to the grant is that the participant has actually undertaken the activity [HE KA131: and in the case of blended intensive programmes, the minimum required number of mobile learner participants has taken part in the activity].]

(c) Supporting documents:

[For SE/AE:

- Individual activities: proof of attendance of the activity in the form of Europass Mobility or another type of document specifying the participant's name and learning outcomes, as well as the starting and end date of the activity. For invited experts, the list of learning outcomes will be replaced with a learning programme provided by the expert. In case accompanying persons have supported the participants during the activity, their names and duration of stay shall also be included. The supporting documents must be signed by the hosting organisation and the participant. [If required by the NA: Additionally, a signed grant agreement between the beneficiary organisation and the participant will be required as supporting documentation for the following activity types: [NA to complete]]
- Group activities: proof of attendance of the activity in the form of a participants list (including accompanying persons) and the implemented learning programme (including the schedule of the activities, the methods used, the achieved learning outcomes, as well as the starting and end date of the activity. The supporting documents must be signed by the sending and receiving organisation. For activities organised at a seat of an institution of the European Union, the supporting documents must be signed by the two sending organisations.]

[For VET: Proof of attendance of the activity in the form of Europass Mobility or another type of document specifying the participant's name and learning outcomes, as well as the starting and end date of the activity. For invited experts, the list of learning outcomes will be replaced with a learning programme provided by the expert. In case accompanying persons have supported the participants during the activity, their names and duration of stay shall also be included. The supporting documents must be signed by the hosting organisation and the participant. [If required by the NA: Additionally, a signed grant agreement between the beneficiary organisation and the participant will be required as supporting documentation for the following activity types: [NA to complete]]]

[For HE: the same supporting documents as specified under the individual support section.]

[For HE KA131: In the case of blended intensive programmes, proof of attendance specifying the participants' name (learners) and their start and end date of the physical activity.]

[For Youth: Proof of attendance of the activity in the form of a declaration signed by the participant and by the receiving organisation, specifying the name of the participant, the purpose of the activity, as well as its starting and end date]

(d) Reporting:

[For HE:

Mobility organisational support:

- There is a margin of tolerance of 10%, meaning that the organisational support grant must not be reduced if the total number of student and staff mobilities is lower than the number of mobilities specified in Annex II of the Agreement by 10% or less.
- At final report stage, if the number of mobilities implemented is higher than the number specified in Annex II, the grant amount for organisational support will be limited to the maximum amount specified in Annex II.

Mobility activities: The beneficiary must report on the achieved activity.

Blended intensive programme organisational support: The beneficiary must report on the achieved activity.]

[For Youth Exchanges and Youth Workers: The coordinator must report on all mobilities realised under the project, including the ones from the host country.

- [For Youth Workers: Participants in the activities should report on the activities via an on-line questionnaire providing their feedback on factual and qualitative elements of the activity period, as well as of its preparation and follow-up.]
- [For Youth Exchanges: Group leaders in the activities should report on the activities via an on-line questionnaire providing their feedback on factual and qualitative elements of the activity period, as well as of its preparation and follow-up.]]
- [For DiscoverEU: Participants in the activities should report on their DiscoverEU travel via an on-line questionnaire providing their feedback on factual and qualitative elements of the activity period, as well as of its preparation and follow-up.]

[For Youth Participation Activities:

C1. Project management costs

- (a) Calculation of the grant amount: the grant amount is calculated by multiplying the number of months per project by the unit contribution applicable as specified in Annex IV of the Agreement.
- (b) Triggering event: the event that conditions the entitlement to the grant is that the beneficiary has actually implemented the project.
- (c) Supporting documents: proof of project implementation will be provided in the form of a description of the undertaken activities in the final report, including a timetable of each of the mobility activities and events implemented.
- (d) Reporting:
 - the beneficiary must report on the Youth Participation Activities project (for informal groups of young people: coordinator on behalf of the informal group of young people) and provide information on the implemented project activities in the final report;

- members of informal group(s) of young people implementing the project must report via an on-line questionnaire providing their feedback on their participation in the project.

C2. Coaching costs

- (a) Calculation of the grant amount: the grant amount is calculated by multiplying the working days of the coach by the unit contribution applicable for the country concerned as specified in Annex IV of the Agreement. A cap limiting the amount awarded for coaching costs will be set at maximum 12 days per project.
- (b) Triggering event: the event that conditions the entitlement to the grant is that the coordinator is an informal group of young people AND that the informal group(s) of young people have used a coach/several coaches for the purposes described in Annex II of the Agreement.
- (c) Supporting documents:
 - proof of involvement of the coach in the project will be provided in the form of a description of the undertaken activities in the final report.
 - proof of the time spent on the project by the coach will be provided in the form of a time sheet including the name of the coach, the dates and the total number of days of work of the coach for the project, duly signed by the coach.
- (d) Reporting: the coordinator must report on the Youth Participation Activities project on behalf of the informal group of young people and include information on the number of days of work and the role/involvement of the coach in the project in the final report.

C3. Additional funding for physical events in YPA projects (youth participation events support)

- (a) Calculation of the grant amount: the grant amount is calculated by multiplying the total number of physical participations in project events (i.e. regardless of whether the same participant will have physically participated in one or more project events) by the unit contribution applicable as specified in Annex IV of the Agreement. The total number of participations considered for the calculation of Youth Participation events support includes the number of participants physically present during the

- events, with the exception of staff of the participating organisation(s)/ members of the informal group(s) of young people and facilitators (but including decision makers, if relevant).
- (b) Triggering event: the event that conditions the entitlement to the grant is that the participant has actually physically attended the activity at its venue.
 - (c) Supporting documents: Proof of attendance of the activity in the form of a declaration signed by the participants and receiving organisation, specifying the name of the participant (and the name and address of the sending organisation of the participant, if relevant), the purpose of the activity, as well as its starting and end date. Detailed agenda of the event and any documents used or distributed during the event.
 - (d) Reporting: On behalf of the Project as a whole, the coordinator must report on the description of the Youth Participation Event(s), the results, venue and numbers of local (and if relevant) international participants.

D. Inclusion support for organisations

- (a) Calculation of the grant amount: the grant amount is calculated by multiplying the total number of participants with [HE: inclusion support] [All but HE: fewer opportunities] in mobility activities by the unit contribution applicable, as specified in Annex IV of the Agreement. [For DiscoverEU: group leaders, accompanying persons, facilitators are not considered to be participants of mobility activities and are therefore not considered for calculation of the inclusion support grant]
- (b) Triggering event: the event that conditions the entitlement to the grant is that the participant has actually undertaken the activity [for HE: and received inclusion support for participants], [for YPA/DiscoverEU: the participating organisation has organised the mobility for the participant].
- (c) [For Youth: Supporting documents: proof of attendance of the activity in the form of a declaration signed by the receiving organisation specifying the name of the participant, the purpose of the activity, as well as its starting and end date.

[For HE: Supporting documents: supporting documents proving the payment of the inclusion support for participants, as specified in section II.2.A of this Annex.

[For SE/AE:

- Individual activities: proof of attendance of the activity in the form of Europass Mobility or another type of document specifying the participant's name and learning outcomes, as well as the starting and end date of the activity. For invited experts, the list of learning outcomes will be replaced with a learning programme provided by the expert. In case accompanying persons have supported the participants during the activity, their names and duration of stay shall also be included. The supporting documents must be signed by the hosting organisation and the participant. [If required by the NA: Additionally, a signed grant agreement between the beneficiary organisation and the participant will be required as supporting documentation for the following activity types: [NA to complete]]
- Group activities: proof of attendance of the activity in the form of a participants list (including accompanying persons) and the implemented learning programme (including the schedule of the activities, the methods used, the achieved learning outcomes, as well as the starting and end date of the activity. The supporting documents must be signed by the sending and receiving organisation. For activities organised at a seat of an institution of the European Union, the supporting documents must be signed by the two sending organisations.]
- [For VET: Proof of attendance of the activity in the form of Europass Mobility or another type of document specifying the participant's name and learning outcomes, as well as the starting and end date of the activity. For invited experts, the list of learning outcomes will be replaced with a learning programme provided by the expert. In case accompanying persons have supported the participants during the activity, their names and duration of stay shall also be included. The supporting documents must be signed by the hosting organisation and the participant. [If required by the NA: Additionally, a signed grant agreement between the beneficiary organisation and the participant will be required as supporting documentation for the following activity types: [NA to complete]]]

– [For ALL but HE: In addition: documentation specified by the relevant National Agency as relevant proof that the participant belongs to one of the categories of fewer opportunities listed in the Programme Guide.]

E. Online Language Support (OLS)

[Key Action 1 – HE]

- The beneficiary must ensure that OLS accesses are awarded to all eligible participants (as soon as possible after their selection for the mobility activity).
- Participants can take as many language courses (and assessments) as they wish, in the languages of the choice available in the OLS tool, taking into account that Higher Education participants undertaking long-term activities (14 days or more) between Member States should nevertheless take a self-assessment in their language of mobility on the OLS tool.
- OLS must be used in the period between the OLS access is granted and the end of the mobility activity.
- The beneficiary must monitor the use of the Online Language Support by participants on the basis of the information provided through the related management tools.
- The beneficiary must make every effort to ensure that all the OLS accesses (which include both assessments and courses) are actively used by the selected participants.
- By signing the individual mobility grant agreement, mobility participants commit to give the necessary attention to their language learning, by using the OLS language assessment and courses before (and, if relevant, during) the mobility, if awarded. Higher Education participants undertaking long-term activities (14 days or more) between Member States commit to take an initial assessment in the language of mobility prior to departure.
- The beneficiary must act in line with the guidelines for use of OLS provided by the OLS service providers.
- The beneficiary must report on the number of used language assessments and courses in their reports.
- In case of significant number of unused OLS accesses at the time of interim and final report submission, the NA may decide to take this into account in the evaluation of the project results, in relation to the beneficiary.]

[For VET/AE/SE/Youth:

- The beneficiary must make optimal use of OLS for provision of linguistic support, as specified in the Erasmus quality standards.
- During implementation, the beneficiary must monitor, support and actively encourage the use of OLS by participants who have been provided with access to OLS courses.
- The beneficiary must act in line with the guidelines for use of OLS provided by the OLS service providers.
- [VET/AE/SE] If the result of OLS assessment shows that a participant's level in required language is not covered by OLS, this result will be considered as sufficient justification to claim the linguistic support unit cost, as specified by the Programme Guide.]
- [VET/AE/SE] The beneficiary must report on provision of linguistic support in their project, including the number of participants that have used OLS.]

[SE/VET/AE:

F. Linguistic support

- (a) Calculation of the grant amount: the grant amount is calculated by multiplying the total number of participants receiving linguistic support by the unit contribution as specified in Annex IV of the Agreement. Participants that have received Online Linguistic Support will be excluded from this calculation. [For SE/VET: Learners in long-term mobility will receive further linguistic support equivalent to the same unit contribution as specified in Annex IV.]
- (b) Triggering event: the event that conditions the entitlement to the grant is that the participant has actually undertaken language preparation in the language of instruction or work.
- (c) Supporting documents:
 - proof of attendance of language courses in the form of a declaration signed by the course provider, specifying the name of the participant, the language taught, the format and duration of the provided courses, or

- invoice for the purchase of learning materials, specifying the language concerned, the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice, or
- in case the linguistic training is provided directly by the sending or receiving organisation: a declaration signed and dated by the organisation providing the training, specifying the name of the participant, the language taught, the format and duration of the linguistic training provided.]

[SE/VET/AE:

G. Course fees

- (a) Calculation of the grant amount: the grant amount is calculated by multiplying the total number of days per course by the unit contribution applicable as specified in Annex IV of the Agreement. Only the days during which the course actually takes place are considered for the calculation of the grant support for course fees.
- (b) Triggering event: the event that conditions the entitlement to the grant is that the participant has participated in a structured course requiring the payment of a course fee.
- (c) Supporting documents: proof of enrolment in the course and of payment of a course fee in the form of an invoice or other declaration issued and signed by the course provider specifying the name of the participant, the name of the course taken, as well as the start and end date of the participant's participation in the course].

[For SE/VET/AE, Youth (with the exception of YPA):

H. Preparatory visits

- (a) Calculation of the grant amount: the grant amount is calculated by multiplying the total number of persons participating in preparatory visits by the unit contribution applicable, as specified in Annex IV of the Agreement and with the limitations specified in the Programme Guide.
- (b) Triggering event: the event that conditions the entitlement to the grant is that the person has actually undertaken the preparatory visit.
- (c) Supporting documents: proof of attendance of the preparatory visit in the form of an agenda and a declaration signed by the participant and by the hosting organisation specifying the name of the person, the purpose of the activity.]

II. RULES APPLICABLE FOR THE BUDGET CATEGORIES BASED ON REIMBURSEMENT OF ACTUAL INCURRED COSTS

II.1. Conditions for the reimbursement of actual costs

Where the grant takes the form of a reimbursement of actual costs, the following conditions must apply:

- (a) they are incurred by the beneficiary;
- (b) they are incurred in the period set out in Article I.2.2.;
- (c) they are indicated in the estimated budget set out in Annex II or eligible following budget transfers in accordance with Article I.17;
- (d) they are incurred in connection with the Project as described in Annex II and are necessary for its implementation;
- (e) they are identifiable and verifiable, in particular are recorded in the beneficiary's accounting records and determined according to the applicable accounting standards of the country where the beneficiary is established and with the beneficiary's usual cost accounting practices;
- (f) they comply with the requirements of applicable tax and social legislation;
- (g) they are reasonable, justified, and comply with the principle of sound financial management, in particular regarding economy and efficiency;
- (h) they are not covered by a unit contribution as specified in Section I of this Annex.

II.2. Calculation of actual cost

For ALL:

A. Inclusion support for participants

- (a) Calculation of the grant amount: the grant is a reimbursement of 100% of the eligible costs actually incurred.
- (b) Eligible costs: **For SE/VET/AE/Youth:** costs directly related to participants with fewer opportunities and their accompanying persons that are additional to costs

supported by a unit contribution as specified in Section I of this Annex. Costs related to travel and subsistence may be requested under this budget category if a grant for the same participants has not been requested through budget categories Travel and Individual support.]

[For HE: These additional costs are those directly related to participants with fewer opportunities and their accompanying persons, which cannot be covered through the top-up amount for individual support for participants with fewer opportunities. In particular these costs aim at covering the extra financial support required for participants with physical, mental or health related conditions to allow their participation in the mobility as well as in preparatory visits.

Funding for accompanying persons for the first 60 days is based on the unit costs for staff mobility (travel support, individual support). [HE KA131: In the same way as for the participant, if travel support unit costs do not cover at least 70% of the real travel costs of the accompanying person, the rules for exceptional costs for expensive travel may be applied.] If the stay abroad is longer than 60 days, the grant item “inclusion support for participants” will be calculated based on real costs for subsistence beyond the 60th day.

Funds for inclusion support for participants, once the participants have been selected, may be made available in two ways. The beneficiary may either submit a funding request to the NA or do a budget transfer according to article I.17.]

- (c) Supporting documents: [For HE: documentation justifying the need for inclusion support for the participant signed by the receiving or sending organisation specifying the name of the participant, the purpose of the activity, as well as its start and end date, documentation of the planned real costs and their approval by the NA, and] proof of payment of the related costs on the basis of invoices specifying the name and address of the body issuing the invoice, the amount and currency, the date of the invoice, and if relevant a documentation signed by the receiving organisation specifying the confirmed start and end date of the stay of the accompanying person).
- (d) Reporting: for each cost item in this budget category, the beneficiary must report the type of costs and the real amount of costs incurred.

For ALL

B. **Exceptional costs**

(a) Calculation of the grant amount: the grant is a reimbursement of 80% of the following eligible costs actually incurred. [For Youth, SE/AE/VET: , with the exception of the cost related to visa, residence permits and vaccinations and medical certifications, which shall be reimbursed at 100%]

(b) Eligible costs:

- Costs relating to a pre-financing guarantee lodged by the beneficiary where such guarantee is required by the NA, as specified in Article I.4.2 of the Agreement.
- Costs of travel in the most economical but also effective way for eligible participants for which the standard funding rule does not cover at least 70% of the eligible costs. [HE KA131: This funding can only be awarded to students and to staff if they are eligible for the separate travel support grant as specified in Article I.2.A.] The exceptional costs for expensive travel replaces the separate travel grant.
- [For HE: For exceptional costs for the financial guarantee, the beneficiary may submit a funding request to the NA. [HE KA131: Funds for exceptional costs support for expensive travel costs, once the participants have been selected, may be made available in two ways. The beneficiary may either submit a funding request to the NA or do a budget transfer according to article I.18.]]
- [For Youth and SE/VET/AE: costs related to visa, residence permits and vaccinations and medical certifications.]
- [For DiscoverEU: Costs related to visa and visa-related costs, residence permits, vaccinations, medical certifications. In addition, reservation costs in case it is not possible to travel without an obligatory seat reservation, in a country where it is applicable. Then these costs can be covered on top of the travel pass. Moreover, expensive travel costs for participants, including group leaders, accompanying persons and facilitators including the use of cleaner, lower carbon emission means of transport.]

(c) Supporting documents:

- Proof of the cost of the financial guarantee issued by the body providing the guarantee to the beneficiary, specifying the name and address of the body issuing the financial guarantee, the amount and currency of the cost of the guarantee, and providing the date and signature of the legal representative of the body issuing the guarantee.
- In the case of travel costs: [HE KA131: documentation justifying the need for this grant for the participant signed by the receiving or sending organisation specifying the name of the participant, the purpose of the activity, as well as its start and end date, documentation of the planned real costs and their approval by the NA, and] proof of payment of the related costs on the basis of invoices specifying the name and address of the body issuing the invoice, the amount and currency, the date of the invoice and the travel route.
- [For Youth and SE/VET/AE: In the case of travel costs related to visa, residence permits and vaccinations and medical certifications: proof of payment of the related costs on the basis of invoices specifying the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice.]

[Key Action 1 – Youth Workers Mobility:

Complementary activities costs (System Development and Outreach Activities)

- (a) Calculation of the grant amount: the grant is a reimbursement of 80% of the eligible costs actually incurred for costs directly linked to the implementation of the Complementary Activities and including a flat-rate amount for indirect costs not exceeding 7% of the eligible direct costs of the complementary activities.
- (b) Eligible costs:
 - Costs directly linked to the implementation of the Complementary Activities, including sub-contracting and purchase of goods and services, in so far as applied for by the beneficiary and in so far as approved by the NA and specified in Annex II;
 - Indirect costs representing the beneficiary's general administrative costs which can be regarded as chargeable to the project (e.g. electricity or internet bills, costs for premises, cost of permanent staff, etc.) not exceeding 7% of the eligible direct costs of the Complementary Activities.

(c) Supporting documents:

- For direct costs: proof of payment of the related costs on the basis of invoices of the actual costs incurred, specifying the name and address of the body issuing the invoice, the amount and currency, and the date of the invoice.
- For indirect costs: no supporting documents required]

(a) Reporting:

- For direct costs: for each cost item in this budget category, the beneficiary must report the type of costs and the real amount of costs incurred.
- For indirect costs: no reporting required

III. CONDITIONS OF ELIGIBILITY OF PROJECT ACTIVITIES

- a) The beneficiary must ensure that the activities of the project for which grant support was awarded are eligible in accordance with the rules set out in the Erasmus+ Programme Guide.
- b) Travel time will not be considered when determining compliance with minimum eligible duration of mobility activities specified in the Programme Guide.
- c) Activities that are not compliant with the rules set out in the Erasmus+ Programme Guide (as complemented by the rules set out in this Annex) must be declared ineligible by the NA and the grant amounts corresponding to those activities must be recovered in full. The recovery must cover all budget categories for which a grant was awarded in relation to the activity that is declared ineligible.

[HE KA131: (d) The beneficiary is allowed to use up to 20% of the latest awarded project grant shown in Article I.3.1. to outbound student and staff mobility to third countries not associated to the Programme (the budget share for international mobility). The following budget categories are counted in this budget share:

- International student mobility grants: individual support and travel support
- International staff mobility grants: individual support and travel support

- Mobility organisational support: calculated on the number of international mobilities with the rate per international mobility being the project's average mobility organisational support per mobility
- Inclusion support for organisations

The real-cost budget categories (grant items) “inclusion support for participants” and “exceptional costs for expensive travel” used for international mobilities are not taken into account in the calculation of the budget share for international mobility, neither as part of the total project grant nor as part of the reported international mobility funds.

IV. FINAL REPORT

[For non-accredited beneficiaries in SE/VET/AE and for Youth:

The final report will be assessed in conjunction with the participant reports, and other project documentation required by this grant agreement and the Erasmus quality standards. The result of the evaluation will be a score out of maximum 100 points. A common set of evaluation criteria will be used to measure the extent to which the project was implemented in line with the approved grant application and the Erasmus quality standards.

For SE/VET/AE: The beneficiary must submit the final report after the project end date. Earlier submissions of the final report will be considered as a request for premature termination of the Grant Agreement and may result in a lower evaluation score.

For Youth: The beneficiary must submit the final report after the project end date or whenever the foreseen activities have been completed.]

[For accredited beneficiaries in SE/VET/AE and Youth:

The final report will be assessed in conjunction with the participant reports, and other project documentation required by this grant agreement and the Erasmus quality standards. The result of the evaluation will be a score out of maximum 100 points. A common set of evaluation criteria will be used to measure the extent to which the project was implemented in line with the targets defined in Annex II of this Agreement, the approved Erasmus Plan, and the Erasmus quality standards.

The beneficiary must submit the final report after the project end date. Earlier submissions of the final report [**For Youth:** could] will be considered as a request for premature termination of the Grant Agreement and may result in a lower evaluation score.]

[For HE:

The final report will be assessed in conjunction with the participant reports, using a common set of quality criteria focusing on:

- The extent to which the project was implemented in line with the grant agreement.
- The extent to which the project was implemented in respect of the quality and compliance requirements set out in the Erasmus Charter for Higher Education and the applicable inter-institutional agreement(s).
- The extent to which the grant amounts due to mobility participants were transferred to them in accordance with the contractual provisions set out in the agreement between the beneficiary and the participant following the templates provided in Annex V of the Agreement.

The final report will be scored on a total of maximum 100 points. If the NA considers that the implementation of the project does not respect the quality commitment undertaken by the beneficiary, the NA may in addition or alternatively require the beneficiary to develop and implement an action plan within an agreed timeframe to ensure respect of the applicable requirements. If the beneficiary does not implement the action plan in a satisfactory manner by the due date, the NA may recommend to the European Commission to withdraw the Erasmus Charter for Higher Education of the beneficiary.]

V. GRANT REDUCTION FOR POOR, PARTIAL OR LATE IMPLEMENTATION

Poor, partial or late implementation of the Project may be established by the NA on the basis of the final report submitted by the beneficiary (including reports from individual participants taking part in the mobility activities).

In addition, the NA may also consider information received from any other relevant source, proving that the Project is not implemented in accordance with the contractual provisions. Other sources of information may include monitoring visits, accreditation interim reports, desk checks or on-the-spot checks undertaken by the NA.

If the final report scores below 60 points in total, the NA may reduce the final grant amount for organisational support [For YPA: project management costs] on the basis of poor, partial or late implementation of the action even if all activities reported were eligible and actually took place. In that case, a grant reduction may correspond to:

- 10% if the final report scores at least 50 points and below 60 points;

- 25% if the final report scores at least 40 points and below 50 points;
- 50% if the final report scores at least 25 points and below 40 points;
- 75% if the final report scores below 25 points.

[For SE/VET/AE: In addition, the NA may reduce the final grant amount for organisational support up to 100% in case the final report evaluation, a monitoring visit or on-the-spot check shows that Erasmus quality standards on good management of mobility activities have not been respected.]

VI. GRANT MODIFICATIONS

[For HE:

(a) Grant modification due to redistribution of funds or additional funds being available

In the framework of redistribution of funds in higher education mobility, or in the event of additional funds becoming available to the NA for (re)allocation to the beneficiaries, the total maximum grant amount indicated in Article I.3.1 may be increased provided that:

[For HE KA131 at interim report stage a high number of mobility activities or longer duration of outbound mobility activities (including invited staff from enterprises when applicable) has taken place or is foreseen to take place . The criteria according to which the additional funds may be provided are the following: [NA to specify the criteria that will be used for redistribution].]

[For HE KA171:

- the beneficiary has not been awarded the full grant requested under the main selection round due to the high demand and limited budget per region;
- mobilities with the region for which further financing is requested had already been requested in the application and had passed the quality assessment;
- on the basis of the information in the interim/progress report and data registered in the Beneficiary Module, the implementation of mobilities granted initially is in line with the Grant Agreement.]

When the interim report shows a very low number of mobility activities indicating that the beneficiary will not fully implement the awarded grant, the total maximum grant

amount indicated in Article I.3.1 may be decreased through an amendment.

[For HE KA171: The final grant amount awarded must not exceed the grant amount requested by the applicant in the initial grant application, unless covered under VI (b). The grant amount requested refers to the overall grant requested in the entire application, irrespective of the specific amounts requested per budget envelope.]

(b) Grant increase for inclusion support and exceptional costs

As there is no provision for requesting inclusion support or exceptional costs at application stage in the field of higher education, the beneficiary may apply for additional grant support once the participants have been selected. Such inclusion support may be provided by the NA for participants with fewer opportunities and their organisation or in the case of exceptional costs as specified under Article II.2.B.

(c) Contractual modifications

In accordance with Article II.13 of Annex I of the Agreement, any modification of the grant as set out in Sections V (a) and (b) above will take the form of an amendment to the Agreement.]

[For accredited beneficiaries in SE/VET/AE/Youth

The total maximum grant amount indicated in Article I.3.1 may be increased with an amendment to the Grant Agreement under the following conditions:

- (a) If additional funds become available to the NA for redistribution to accredited beneficiaries and under the condition that information provided by the beneficiary through the Erasmus+ reporting and management tool shows that they are able to implement additional mobility activities.
- (b) Up until the expiry of 12 months from the start of the project, the beneficiary may submit justified requests for additional funds for exceptional costs and inclusion support for participants if these additional needs cannot be covered with a transfer of funds within the existing grant amount without negatively affecting the delivery of targets specified in Annex II.

The National Agency will consider such requests if funds remain available for this purpose. In case a request for additional funds is approved, the National Agency

shall assess if the amendment for additional funds must be made immediately, or at a later stage.

The National Agency shall make its assessment based on the pre-financing amount already paid to the beneficiary, the amount of additional funds requested, and the nature of the expenses to be approved. The National Agency shall issue the required amendment as a matter of urgency if it is necessary for the beneficiary to comply with rules on provision of inclusion support for participants, as specified in the Special Conditions.]

VII. CHECKS OF GRANT BENEFICIARY AND PROVISION OF SUPPORTING DOCUMENTS

In accordance with Article II.27 of the Annex I of the Agreement, the beneficiary may be subject to checks and audits in relation to the Agreement [For HE KA171: ,including both inbound and outbound mobility]. Checks and audits aim at verifying whether the beneficiary managed the grant in respect of the rules set out in the Agreement, in order to establish the final grant amount to which the beneficiary is entitled.

A final report check must be performed for all projects. In addition, the project may be subject to further desk check or on-the-spot check if the project Agreement is included in the NA sample required by the European Commission or if the NA has selected it for a targeted check based on its risk assessment.

For final report check and desk check, the beneficiary must supply to the NA physical or electronic copies of supporting documents specified in the section I.2, 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, a copy of the supporting documents may be sent instead.

For any type of check the beneficiary 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.

The different checks must include the following:

a) Final report check

The final report check is undertaken at final report stage at the NA premises in order to establish the final grant amount to which the beneficiary is entitled.

The beneficiary's final report to the National Agency must include the following information (if applicable within the action format and project concerned):

- Unit contributions consumed for budget categories:
 - [HE: Mobility] Organisational support
 - [HE KA131: Blended intensive programme organisational support]
 - Travel support
 - Individual support
 - [For YPA: Youth participation events support]
 - [For DiscoverEU: travel band for remote areas on top of the travel pass]
 - Coaching costs]
 - Inclusion support for organisations [for YPA: inclusion support related to mobilities]
 - [For SE/VET/AE and youth: Preparatory visits]
 - [For SE/VET/AE: Course fees]
 - [For SE/VET/AE: Linguistic support]
- Actual costs incurred for budget categories:
 - Inclusion support for participants [for YPA: inclusion support]
 - Exceptional costs
 - [for youth workers: Complementary activities for Youth Workers Mobility]

b) Desk check

Desk check is an in-depth check of supporting documents at the NA premises that may be conducted at or after the final report stage. Upon request, the beneficiary must submit to the National Agency the supporting documents for all budget categories.

c) On-the-spot checks

On-the-spot checks are performed by the NA at the premises of the beneficiary or at any other premises relevant for the execution of the Project. During on-the-spot checks, the beneficiary must make original supporting documentation for all budget categories available for review by the National Agency, and must enable the National Agency access to the recording of project expenses in the beneficiary's accounts.

On-the-spot checks can take the following forms:

- **On-the-spot check during project implementation:** this check is undertaken during the implementation of the Project in order for the National Agency to directly verify the reality and eligibility of all project activities and participants. [For HE KA171: and to establish compliance with the commitments undertaken as a result of the inter-institutional agreement (s)];

- **On-the-spot check after completion of the project:** this check is undertaken after the end of the Project and usually after the final report check.

[For accredited beneficiaries]

- **Systems check**

The systems check is performed to establish the beneficiary's system for making its regular grant claims in the context of the programme as well as its compliance with the commitments undertaken as a result of their accreditation. The systems check is performed to establish the beneficiary's compliance with the implementation standards committed to in the framework of the Erasmus+ Programme. The beneficiary must enable the National Agency to verify the reality and eligibility of all project activities and participants by all documentary means, including video and photographic records of the activities undertaken, in order to rule out double funding or other irregularities.