Erasmus+ Capacity Building in the field of Higher Education
What information will you have at the end of the presentation?

The financing rules

The application and assessment steps
Part I – The financing rules
How to calculate the budget

Partnership Agreement
### Part I: How to calculate the budget - Categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staff costs</strong> (max 40%)</td>
<td>4 <strong>Staff Categories</strong> (Manager, Researcher/ Teacher/Trainer, Technician, Administrator)</td>
</tr>
<tr>
<td><strong>Travel costs</strong></td>
<td><strong>Students/staff from partners</strong> 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 <strong>project beneficiaries organisation</strong>.</td>
</tr>
<tr>
<td><strong>Costs of stay</strong></td>
<td>Subsistence, accommodation, local and public transport, personal or optional health insurance.</td>
</tr>
<tr>
<td><strong>Equipment</strong> (max 30%)</td>
<td>Purchased <strong>exclusively</strong> for the benefit of HEIs in the Partner Countries</td>
</tr>
<tr>
<td><strong>Sub-contracting</strong> (max 10%)</td>
<td>Exceptional for services related to competences that can't be found in the consortia</td>
</tr>
</tbody>
</table>
Part I: 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.
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.
Part I: 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))
Part I: 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)
Part I: How to calculate the budget - STAFF COSTS

<table>
<thead>
<tr>
<th>Financing mechanism for staff costs (see Programme Guide page 158, 160 and page 161 Table A and B)</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unit costs</strong></td>
<td><strong>Max. 40% of the total grant</strong></td>
</tr>
<tr>
<td>Subdivided in 4 categories and country groups (4 groups for Programme and 4 groups for Partner Countries)</td>
<td></td>
</tr>
<tr>
<td>per manager involved per day</td>
<td></td>
</tr>
<tr>
<td>per researcher/ teacher/trainer involved per day</td>
<td></td>
</tr>
<tr>
<td>per technician involved per day</td>
<td></td>
</tr>
<tr>
<td>per administrative staff involved per day</td>
<td></td>
</tr>
</tbody>
</table>
### Part I: How to calculate the budget Travel/Cost of Stay

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

<table>
<thead>
<tr>
<th>DAYS</th>
<th>STAFF</th>
<th>STUDENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-14</td>
<td>120€</td>
<td>55€</td>
</tr>
<tr>
<td>15-60</td>
<td>70€</td>
<td>40€</td>
</tr>
<tr>
<td>61 - 180</td>
<td>50€</td>
<td>n.a.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Distance Bands</th>
<th>Unit Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>100-499 km</td>
<td>180€</td>
</tr>
<tr>
<td>500-1999 km</td>
<td>275€</td>
</tr>
<tr>
<td>2000-2999 km</td>
<td>360€</td>
</tr>
<tr>
<td>3000-3999 km</td>
<td>530€</td>
</tr>
<tr>
<td>4000-7999 km</td>
<td>820€</td>
</tr>
<tr>
<td>8000 km and more</td>
<td>1.100€</td>
</tr>
</tbody>
</table>

For eligible activities please refer to page 287-288.
Part I: How to calculate the budget - Travel/Cost of Stay


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 €
Part I: How to calculate the budget

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
### Part I: How to calculate the budget - Travel Costs

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</tr>
<tr>
<td>8000 km and more</td>
<td>1.100€</td>
</tr>
</tbody>
</table>
## Part I: How to calculate the budget

### STUDENTS - Cost of Stay

**Costs of Stay €/Month**

<table>
<thead>
<tr>
<th>Students from Programme</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Irrespective of hosting country</td>
<td></td>
<td></td>
</tr>
<tr>
<td>650 €</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Students from Partner countries</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Country group 1 hosting</td>
<td>Country group 2 hosting</td>
<td>Country group 3 + 4 hosting</td>
</tr>
<tr>
<td>850 €</td>
<td>800 €</td>
<td>750 €</td>
</tr>
</tbody>
</table>
**Erasmus+**

**Part I: How to calculate the budget**

**STAFF Costs of Stay**

<table>
<thead>
<tr>
<th>Cost of Stay €/Day</th>
<th>Staff from Partner Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cost of Stay €/Day</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Days</th>
<th>Country group 1 hosting</th>
<th>Country group 2 hosting</th>
<th>Country group 3 hosting</th>
<th>Country group 4 hosting</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-14</td>
<td>160 €</td>
<td>140 €</td>
<td>120 €</td>
<td>100 €</td>
</tr>
<tr>
<td>15-60</td>
<td>112 €</td>
<td>98 €</td>
<td>84 €</td>
<td>70 €</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cost of Stay €/Day</th>
<th>Staff from Programme Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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Part I: 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
Part II – The application and

The assessment steps
How and what do I submit?

What is assessed-criteria?
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)
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
Part II: What is assessed?
Assessment of CBHE Projects

Eligibility Criteria
Exclusion & Selection Criteria
Award Criteria
Part II: 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.)
Part II: 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.)

<table>
<thead>
<tr>
<th><strong>Legal person status</strong> of the applicant organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial capacity</strong> to complete the proposed activities (private entities only)</td>
</tr>
<tr>
<td><strong>Operational capacity</strong> to complete the proposed activities</td>
</tr>
</tbody>
</table>

Based on supporting and administrative documents, like the declaration of honour, legal entity form, profit and loss accounts...
Part II: 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 at least 15 points for "Relevance"**.
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
thank you