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Capacity

Building in

the field of

Higher

Education



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State of play of your project's contractual process

Grant Agreement

- Issued as from October 2015
- PIC issues 

Reporting obligations

- Intermediary report
- Final report

Payments to the coordinator

- First instalment at contract signature
- Second instalment (when 70% of first instalment spent)
- Payment modalities within the consortium: defined in Partnership Agreement



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Institutional Commitment

Institutional commitment is essential:

At HEI level:

- Academic authorities
- Finance Department, International Office
- Students

At Ministry level

- Structural projects

Will ensure:

- Expertise in terms of administrative/financial constraints
- National dissemination and Sustainability



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Communication internal to the consortium

With Coordinator and other partners

- Project kick-off meeting
- Defined in Partnership agreement

National coordinator

- Main Partner Country contact for the project
- Facilitates communication with partners from Partner Countries
- Not compulsory



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External Communication

With your National Erasmus+ Office

- Support to projects
- Experience in Tempus/Erasmus+ projects

With EACEA Agency

- One project Officer responsible for your project
- Contact only possible via coordinator
- Exception: exceptional circumstances, e.g. conflict with coordinator.



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Grantholders' meeting

Dates

- 27-28 January 2016
- Brussels

Participants

- Coordinator + 1 PC Partner

Content

- Project management rules
- Financial rules

Ask information to your project coordinator



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Budget Categories : Thresholds

Staff costs	Max 40% of total eligible costs
Equipment	Max 30% of total eligible costs
Sub-contracting	Max 10% of total eligible costs



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Project Budget Calculation & Reporting

5 Budget
Categories



Staff UC

Travel UC

Costs of Stay UC

Equipment RC

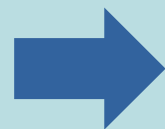
Subcontracting RC

2 Allocation &
Justification
Methods

Real Costs
(RC)

Unit Costs
(UC)

Other types of costs (ex: dissemination, overheads costs, etc.) are not considered for the calculation of the grant.



Expected to be **covered
by co-funding.**



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Justification of the costs

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

- Expenses incurred
- Supporting documents

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

- Result-based
- No need to prove the actual expenditure
- But need to prove the "triggering event" (i.e.: the fact the activity has taken place (e.g. teaching, training))



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Unit costs

Unit costs values mentioned in the **Guidelines:**
ONLY for:

- Budget calculation
- Reporting purposes

Consortium reimbursement mechanisms

- Should be different from the values mentioned in the Guidelines
- Agreed by consortium
- Described in Partnership Agreement



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DRAFT

Supporting documents for Real Costs

Budget Headings	Supporting documents
Equipment	<ul style="list-style-type: none">▪ Invoices▪ Bank statements▪ Tendering procedure: 3 quotations from different suppliers for expenses exceeding 25.000€
Sub-contracting	<ul style="list-style-type: none">▪ Subcontracts▪ Invoices▪ Bank statements▪ Tendering procedure: 3 quotations from different suppliers for expenses exceeding 25.000€

To be confirmed in the Guidelines for the Use of the Grant, which will be published on the Agency's website at the end of 2015



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Supporting documents for Unit Costs

Budget Headings	Supporting documents
Staff	<ul style="list-style-type: none">▪ Formal employment contract▪ Staff convention▪ Timesheets▪ Agendas▪ Attendance / Participant lists▪ Tangible outputs/products
Travel and Costs of Stay	<ul style="list-style-type: none">▪ Individual Mission Report (IMR)▪ Invoices, receipts, boarding passes▪ Agendas▪ Attendance / Participant lists▪ Tangible outputs/products

To be confirmed in the Guidelines for the Use of the Grant, which will be published on the Agency's website at the end of 2015



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Equipment rules

No Rule of Origin

- Equipment can come from anywhere

Equipment purchase limited to HEIs only

- HEIs recognised by Ministry of Education

Changes to the list of equipment

- Possible if well justified
- Must be authorised by Agency

Launch purchase asap

- Tender procedure takes time
- Start using the equipment during the project's lifetime



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Subcontracting rules

Amount of subcontract	Tasks to perform
Over 10.000 EUR	Ask authorisation to the Agency
Over 25.000 EUR	Tendering procedure <ul style="list-style-type: none">▪ In conformity with national legislation▪ Three quotes from different suppliers at least



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Synergies with other projects

- Check if there are other Tempus/CBHE projects in the same subject area
- Check if there are complementarities
- Organise meetings with other projects to share:
 - Outputs
 - Experience
 - Best practices



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Changes to the project

Administrative changes

- Address, Legal name, Legal representative, Bank Account, etc.

Functional changes

- Work programme, equipment, eligibility period
- Partnership (withdrawal, addition, replacement)
- Budget: 10% rule

How to proceed

- Inform coordinator asap, who will in turn inform the Agency
- The Agency will ask for supporting documents
- If the change is accepted: an amendment will be carried out if needed
- At the latest 1 month before the project's end date



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Field Monitoring Visits (1/2)

Part of the monitoring strategy of EACEA Agency

- Justification: CBHE Grant Agreement
- Annual Monitoring Plan
- NEO mandate
- National plan communicated to each NEO

Aim of Monitoring visit

- Conducted by NEO
- Check that project is on track
- Check that partners are fully involved in the project
- Offer support and advice



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Field Monitoring Visits (2/2)

Format

- Presentation of state-of-play by all partners
- Recommendations from NEO

Role of EACEA Agency

- Feedback to project coordinator
- Occasional participation in monitoring visits

Each project will be visited at least once in each partner country



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How to manage your project (1/3)

Be aware of your role in the project

- Read the project application
- Find out what you are supposed to do

Read all project contractual and financial documents

- To be provided by coordinator
- EACEA Agency website
- Project documents
 - Grant Agreement
 - Guidelines for the Use of the Grant
 - Frequently Asked Questions



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How to manage your project (2/3)

Be aware of your Institution's internal rules

- Ask your administration
- Communicate these rules to the coordinator

Be aware of the national constraints/legislation

- Visa requirements
- Project registration
- VAT
- Staff payment modalities, Accreditation of newly developed curricula



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How to manage your project (3/3)

Meet and discuss with your consortium:

- Distribution of tasks
- Financial provisions
- Rules (CBHE + national rules + your institution's)

Draft a Partnership agreement

- Agree with your consortium on the procedures you will adopt
 - Make sure you understand all the rules which will apply to you
 - Make sure you have a voice in the decision-making process
- Consolidate your agreements in writing
- Template available on Agency's website at the end of 2015



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Partnership / Cooperation Agreement

- **Mandatory**
- **Covers all aspects of the project:**
 - The partners role and responsibilities
 - Financial Management
 - Project Management and decision-making process
 - Project Quality Assurance
 - Decision/Conflict resolution mechanisms
- **National constraints/legislation**
 - National constraints/legislation of the project partners must be taken into account
- **Must be negotiated with partners**



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Recap: Novelties CBHE vs. Tempus

- Equipment: no Rule of origin anymore
- Special Mobility strand
- Unit costs
- Supporting documents for staff and travel costs (unit costs)
- No need to justify co-funding anymore
- Indirect costs: not covered by the grant anymore
- Partnership agreement mandatory
- Payment instalments: 50 - 40 - 10%
- Penalties if weak project implementation
- Associated partners
- PICs



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Conclusion

Learn and understand the CBHE rules

Take your place in the consortium

Full partner

Rights & Obligations



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In case of doubt?

Do not hesitate to refer to:

- Contractual documents (Grant Agreement)
- EACEA website: http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en
- Guidelines for the Use of the Grant
- Frequently Asked Questions (FAQs)
- Your coordinator / partners
- National Erasmus+ Office (NEO)
- EACEA Agency (through your coordinator)



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