

ANNEX 2 – APPLICABLE RULES TO ELIGIBLE COSTS

1. UNIT CONTRIBUTIONS

Place of origin: the place where the sending organisation is located.

Sustainable means of transport: bike, bus, car-pooling, and train. The National Agency may accept other means of transport as sustainable based on established practice and on a case-by-case basis.

Travel unit contribution for sustainable means of transport (green travel) is eligible if sustainable means of transport have been used for the majority of the round trip.

Unit contribution per distance band: the amount paid for a return travel between the place of departure and the place of arrival.

Venue: 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.

Travel time will not be considered when determining compliance with minimum eligible duration of mobility activities specified in the Programme Guide.

1.1 Travel Support

Unit contributions for travel are applicable for any staff mobility.

For student mobility, unit contributions for travel are applicable:

- i) 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;
- ii) for participants with fewer opportunities on short-term student mobility;
- iii) 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 case iii), beneficiaries may decide not to provide to participants a travel unit contribution, except for participants with fewer opportunities. The criteria for this decision have to ensure equal treatment and have to be fair, transparent, documented and published on the institution's website.

a) Calculation of the total unit contribution:

The total unit contribution for travel support is calculated by multiplying the number of participants per distance band, by the unit contribution applicable to the distance band concerned and type of travel (standard or sustainable means), as specified in Annex 3 of the Agreement.

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 total unit contribution for travel support is calculated by the beneficiary in the Erasmus+ reporting and management tool based on the applicable unit contribution rates.

b) Triggering event

The travel support is paid only if the participant has actually undertaken the activity.

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.

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 (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.

In addition to the supporting documents mentioned above, in case of use of sustainable means of transport (green travel): a declaration on honour signed by the person receiving the travel grant will serve as supporting documentation. Participants should be informed of their duty to keep the proof of travel (transport tickets) and to provide it to the beneficiary, if requested.

If a the starting point of travel is different than the place of origin or the end point is different than the venue, the beneficiary must report the reason for this difference. In case no travel took place or the travel was funded from EU sources other than the Erasmus+ Programme, the beneficiary will indicate in their report that financial support for travel is not required.

1.2 Individual support

a) Calculation of the total unit contribution:

The total unit contribution 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 3 of the Agreement. Funded travel days may be added if relevant for a specific activity, as specified in Annex 3.

In the case of an incomplete month for long-term mobilities, the total unit contribution 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.

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 travel support grant, they are entitled to receive the top-up amount to individual support for green travel as specified in Annex 3.

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).

For staff: the total unit contribution 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 3 of the Agreement. Funded travel days may be added if relevant for a specific activity as specified in Annex 3.

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:

- 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).

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 resume and continue the activities after the interruption (within the conditions established in this Agreement).

In case of termination of the agreement by the participant due to *force majeure*, the participant must be entitled to receive the amount of the grant corresponding 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 individual support is paid only if the participant has actually undertaken the activity for the specified period.

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 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

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.

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

For the top-up amount for fewer opportunities: Proof of meeting one national criterion (e.g. a self-declaration if allowed as supporting document as part of the national criteria).

d) Reporting:

Participants must use the standard on-line questionnaire provided by the European Commission (the participant report) to report on factual information and their appreciation of the mobility activity, its preparation and follow-up.

Participants who fail to submit their report may be required to partially or fully reimburse the financial contribution received from Erasmus+.

1.3 Organisational support

a) Calculation of the total unit contribution

The total unit contribution is calculated by multiplying the total number of mobility activities by the unit contributions applicable as specified in Annex 3 of the Agreement.

The total number of mobility activities 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.

For a blended intensive programme the total unit contribution is calculated by multiplying the total number of participants (mobile learners) in the blended intensive programme, incoming through student study or staff training mobility activities, by the unit contribution applicable as specified in Annex 3 of the Agreement.

b) Triggering event:

The organisational support is paid only if the participant has actually undertaken the activity. In the case of blended intensive programmes, the unit contribution is paid if the activity has taken place.

c) Supporting documents:

The same supporting documents as required for individual support including in the case of blended intensive programmes.

d) Reporting:

The beneficiary must report on the actual number of participants in mobility activities.

If at the final report stage, the reported total number of mobilities implemented is lower by 10% or less than the number of mobilities in Annex 1 of the Agreement, the organisational support must not be reduced.

If at the final report stage, the reported total number of mobilities implemented is higher than the number in Annex 1 of the Agreement, the organisational support will be limited to the maximum amount in Annex 1 of the Agreement.

For blended intensive programmes, if at the final report stage, the reported total number of learner mobilities implemented is lower by 10% or less of mobilities in Annex 1 of the Agreement, the blended intensive programme organisational support must not be reduced.

If at final report stage, the reported total number of mobilities implemented is higher than the number in Annex 1 of the Agreement, the blended intensive programme organisational support will be limited to the maximum amount in Annex 1 of the Agreement.

1.7 Inclusion support for organisations

a) Calculation of the total unit contribution:

The total unit contribution is calculated by multiplying the total number of participants with inclusion support in mobility activities by the unit contribution applicable, as specified in Annex 3 of the Agreement.

b) Triggering event:

The inclusion support for organisation is paid only if the participant has actually undertaken the activity and received inclusion support for participants

c) Supporting documents:

Proof of attendance of the activity in the form of a declaration signed by the receiving organisation and by the participant specifying the name of the participant, the purpose of the activity, as well as its starting and end date and any document proving the payment of the inclusion support for participants, as specified in section 2.1 of this Annex

2. ACTUAL COSTS

2.1 Inclusion support for participants

a) Calculation of the grant amount:

The grant is a reimbursement of 100% of eligible costs actually incurred.

b) Eligible costs:

Additional costs directly related to participants with fewer opportunities and their accompanying persons that cannot be covered through the top-up amount to 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).

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 budget category “Inclusion support for participants” will be calculated based on real costs for subsistence beyond the 60th day.

Once the participants have been selected, funds for inclusion support for participants 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 Annex 5 of the Agreement.

c) Supporting documents:

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 nature of costs and the real amount of costs incurred.

2.2 Exceptional costs

a) Calculation of the grant amount:

The grant is a reimbursement of 80% of the following eligible costs actually incurred

b) Eligible costs:

- (i) Costs relating to a pre-financing guarantee lodged by the beneficiary where such guarantee is required by the NA as set out in the Data Sheet (see Point 4).
- (ii) Expensive travel cost: Cost of travel in the most economical and effective way if the unit contribution does not cover at least 70% of the costs of travel. This funding can only be awarded to students and to staff if they are eligible for the unit contribution for travel support. The exceptional costs for expensive travel replace the travel support. Once the participants have been selected, the beneficiary may either submit a funding

request for expensive travel costs as exceptional costs to the NA or cover them by doing a budget transfer according to Annex 5 of the Agreement.

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 expensive travel costs: 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.