

DECISION authorising the use of lump sums and unit costs under the Erasmus+ Programme 2021 - 2027

| HISTORY OF CHANGES | | |
|---------------------------|--|--|
| Version | Publication date and Ares Reference | Changes |
| 1.0 | 24/03/2021 Ares(2021)2083983 | Initial version |
| 2.0 | 23/11/2021 Ares(2021)7195205 | <p>Amendment to Annex 1</p> <ul style="list-style-type: none"> • in particular to modify the following sections <ul style="list-style-type: none"> ○ 3.1.4.1 Higher Education, ○ 3.1.4.2 Mobility projects for VET learners and staff, School education pupils and staff, Adult education learners and staff, ○ 3.1.4.3 Youth exchanges and, mobility of Youth workers and Youth participation activities, ○ 3.2.1 Cooperation Partnerships • and to add the following actions: <ul style="list-style-type: none"> ○ DiscoverEU Inclusion action (under section 3.1.9), ○ Support and network functions of National Agencies (under section 3.3) <p>Amendment to Annex 2</p> <ul style="list-style-type: none"> • in particular to modify the following sections <ul style="list-style-type: none"> ○ 3.1.1 XXX ○ 3.1.7 Cooperation partnerships in the field of sport, Education and Training, Youth (European NGOs) • and to add the following actions: <ul style="list-style-type: none"> ○ Virtual Exchanges (under section 3.2), ○ Capacity Building in the field of VET, in the field of Higher Education and in the field of Sport (under section 3.2), ○ Policy Networks (under section 3.2), ○ National Erasmus Offices (under section 3.2), ○ Social Inclusion and Common Values (under section 3.2), ○ European policy network on teacher and school leaders (under section 3.2), ○ European Policy network in the field of education of children and young people with migrant background (under section 3.2), ○ Jean Monnet EU Initiative (under section 3.1.4) |

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| 3.0 | 17/10/2022 Ares(2022)7195454 | <p>Amendment to Annex 2</p> <ul style="list-style-type: none"> • In particular to add the following actions <ul style="list-style-type: none"> ○ Civil Society Cooperation: Education and Training (under section 3.1.8) ○ Civil Society Cooperation: Youth (under section 3.1.8) |
| 4.0 | 18/11/2022 Ares(2022)8015164 | <p>Amendment to Annex 1</p> <ul style="list-style-type: none"> • In particular to modify section 3.1.4 – Individual support |
| 5.0 | XX/XX/2023 Ares(2023)XXXX | <p>Amendment to Annex 1</p> <ul style="list-style-type: none"> • In particular to modify section <ul style="list-style-type: none"> ○ 3.1.1 Travel support : new amounts according to distance bands ○ 3.1.2 Organisational support : updated amounts for adult education (3.1.2.2) and youth (3.1.2.3) ○ 3.1.3 Inclusion support for organisations : update of the fixed amount per eligible participant for all sectors ○ 3.1.4 Individual support : update of the three country groups, amounts for HE staff, VET staff and learners, adult education staff and learners, school staff and pupils, youth exchanges and youth workers ○ 3.1.5 Preparatory visits : new fixed amount per participant ○ 3.1.8.2 Coaching costs : update of the country groups ○ 3.1.9 DiscoverEU inclusion action : new amount of support per participant per day <p>Amendment to Annex 2</p> <ul style="list-style-type: none"> • In particular to modify the following actions: • <ul style="list-style-type: none"> ○ Jean Monnet : new lump sums for Jean Monnet Chairs, Jean Monnet Modules and EU Learning Initiatives. (section 3.1.3, 3.1.4) ○ Erasmus Mundus Joint Master -Design Measuress : new lump sum (section 3.1.5) <p>And add the following actions to section 3.2:</p> <ul style="list-style-type: none"> ○ Erasmus+ Teacher Academies |

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| | | ○ European policy experimentations |
| | | |

Having regard to the Treaty on the Functioning of the European Union,

Having regard to Regulation 2021/817 of the European Parliament and of the Council establishing 'Erasmus+': the Union programme for education, training, youth and sport¹, and in particular Article 18.2

Having regard to Regulation (EU, Euratom) No 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union², and in particular Articles 125 and 181 thereof,

Whereas:

- (1) Given the high number of actions and individual grants under the Erasmus+ programme, there is significant potential for simplification.
- (2) The use of lump sum and unit contributions will reduce administrative burden/costs for beneficiaries and the granting authority, speed up the payment process and facilitate increased focus on the quality of the results.
- (3) Simplified cost options have been implemented in predecessor programmes to Erasmus+ with great success in improving access, simplifying management, and reducing irregularity; Simpler funding rules relating to reimbursement of costs can also facilitate a wider range and increased quality of applications, and provide legal certainty to beneficiaries.
- (4) The use of lump sum and unit contributions under the Erasmus+ programme 2021-2027 should therefore be authorised.

THE FOLLOWING HAS BEEN DECIDED:

Sole Article

The use of the Union contribution in the form of lump sum and unit contributions is authorised for education and training, youth and sport actions under the Erasmus+ Programme 2021-2027, for the reasons and under the conditions set out in the Annex.

This Decision amends and replaces the previous Decision authorising the use of lump sums and unit costs under the Erasmus+ Programme, of 18 November 2022 Ares(2022)798015164.

¹ Political agreement between the European Parliament and the Council has been reached on 11 December 2020 and the Regulation is currently in the adoption procedure by the co-legislators.

² Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012 (OJ L 193, 30.7.2018, p.1). @ecat

done at Brussels,

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Annex I – de-centralised actions – indirect management

1 Forms of Union contribution and categories of costs covered

1.1 Key Action 1

The Union contribution for mobility actions under Key Action 1 of the Erasmus+ programme shall exclusively take the form of unit contributions for the following categories of eligible costs:

- Organisational support;
- Individual support;
- Inclusion support for organisations;
- Travel support;
- Course fees;
- Linguistic support;
- Preparatory visits;
- Project management;
- Coaching costs;
- Youth participation events support;

The following categories of eligible costs shall be reimbursed on the basis of eligible costs actually incurred:

- Exceptional costs;
- Inclusion support for participants with fewer opportunities.
- System development and outreach activities;

The amounts of the unit contributions to be used shall be calculated in accordance with point 3.

1.2 Key Action 2

Under Key Action 2 of the Erasmus+ programme, the Union contribution shall exclusively take the form of lump sum contributions.

2 Justification

By Decisions C(2013)8550 and C(2017)6864, the Commission authorised the use of simplified forms of grants in the Erasmus+ programme 2014 – 2020, where the use of real costs was limited to a minimum.

The approach to be followed for the programming period 2021-2027 is largely based on the provisions set out in the aforementioned Decisions, with the introduction of additional simplified forms of grants, such as the use of single lump sums for partnerships under Key Action 2. While some unit cost amounts are to reflect the current levels of the cost of living and new needs associated with the programme priorities, the overall structure of the funding mechanism remains unchanged. This is intended to facilitate the transition to the new programming period and was welcomed positively by stakeholders during the consultation process.

These simplified forms of grant shall cover all educational and training sectors, including Higher education (hereafter “HE”), School education (hereafter “SE”), Vocational education and training (hereafter “VET”), Adult education (hereafter “AE”) and Youth under different activities. Unit costs shall be widely used in Key Action 1 as the largest share of the overall programme budget is allocated to learning mobility.

Reimbursement of eligible costs using simplified forms of grants for actions covered by this Decision are considered appropriate because they are high volume, benefit most from automation through the use of web-based forms, are appropriate for implementation in the context of indirect management and provide transparency for final participants.

While great effort has been made to establish harmonised unit contributions for different target groups and activities in Erasmus+, this Decision also recognizes that there are different needs in some areas, which requires a differentiated approach. This is the case particularly for the Learning Mobility actions, which require some variation in order to prevent a negative impact on mobility numbers or budget absorption. For this reason it is justified to set ranges of unit contributions for those cases, which can then be applied by national agencies depending on their particular circumstances.

The use of lump sums, unit costs and flat-rate funding in the Programme has considerably simplified the calculation of the grant amounts in comparison to the 'traditional' system of basing the amount of the grant on a detailed budget of eligible costs per cost category. It has decreased the workload of the contracting authorities and sped up the payment procedure. It also reduces regularity errors on the part of the beneficiaries, thus resulting in lower error rates.

In summary the use of simplified forms of contribution will ensure simplification through:

- greater predictability for grant beneficiaries who can take the pre-established rates into account when submitting their applications making the actions more attractive;
- greater focus on outputs rather than inputs, placing more emphasis on the quality and level of achievement of measurable objectives;
- reduced administrative burden at application and payment stage reducing overheads for NAs and facilitating productivity gains;
- simplified reporting requirements (no certification or formal financial statement to be provided by beneficiaries);

- greater facilitation of the ex-post analysis and further limitation of the risk of error;
- consistency across actions in the Programme where appropriate making it easier for beneficiaries participating in more than one action to manage their budgets;
- less complex funding rules contributing to easier readability of the Programme Guide.

2.1 Nature of the supported actions

2.1.1 Key Action 1: Learning mobility of individuals

This Key Action supports learning mobility activities for individuals in the following fields:

- Higher Education
- Vocational Education and Training (VET)
- School Education
- Adult Education
- Youth activities
- Sport

Learning mobility is defined as “moving physically to a country other than the country of the sending institution/organisation and of residence, in order to undertake study, training or non-formal or informal learning; it may take the form of traineeships, apprenticeships, youth exchanges, teaching or participation in a professional development activity, and may include preparatory activities, such as training in the host language, as well as sending, receiving and follow-up activities”.

2.1.2 Key Action 2: Cooperation for innovation and the exchange of good practices

This Key Action supports:

- Partnerships for Cooperation, including Cooperation Partnerships and Small-scale Partnerships;

A Partnership is defined as “an agreement between a group of participating organisations in different Programme Countries to carry out joint European activities in the fields of education, training, youth and sport or establishing a formal or informal network in a relevant field such as joint learning projects for pupils and their teachers in the form of class exchanges and individual long-term mobility, intensive programmes in higher education and cooperation between local and regional authorities to foster inter-regional, including cross-border cooperation; it may be extended to institutions and/or organisations from Partner Countries with a view to strengthening the quality of the partnership”.

2.1.2.1 Cooperation partnerships

The primary goal of this action is to allow organisations and institutions to increase the quality and relevance of their activities and/or develop and reinforce their networks of partners, thus increasing their capacity to operate jointly at transnational and international level, boosting internationalisation of their activities (including internationalisation at home), sharing and confronting ideas, exchanging new practices and methods.

2.1.2.2 Small scale partnerships

This action aims at widening access to the programme to small-scale actors and individuals who are hard to reach in education, training, youth and sport. With lower grant amounts awarded to organisations, shorter duration and simpler administrative requirements compared to the cooperation partnerships, this action will aim to reach out to grassroots organisations and newcomers to Erasmus+, reducing entry barriers to the programme for organisations with smaller organisational capacity.

2.2 Risks of irregularities and fraud and costs of control

The risk of irregularity and fraud when using these simplified forms of grant are considered low for the following reasons:

- the inherent risk of irregularity is low due to the fact that the nature of the funded actions are very standardised, and the associated triggering events are straightforward to verify and monitor;
- the population of beneficiaries is mostly experienced and recurrent, and the entrusted bodies (National Agencies) are subject to a standardised approach;
- in order to reduce the risk of fraud and irregularities linked to the use of simplified forms of grants in the Erasmus+ programme, a detailed set of minimum requirements for the internal control system of National Agencies has been defined based on the requirements resulting from the Financial Regulation for indirect management³ implemented by National Agencies under the Erasmus+ programme.

In addition, an assessment of the expected level of risk of error is carried out annually and subsequently the Anti-Fraud Strategy (revised 2020) provides for tailored fraud prevention and protection measures.

As regards costs of control, reporting and control shall focus on the realisation of the supported activity and the achieved results rather than on the eligibility of costs incurred, reducing the workload and scope for error of both programme participants and managing bodies. The whole monitoring system is set up in a manner so as to ensure efficiency and cost-effectiveness of the controls. The possibility for ex post controls of performance is foreseen which can further verify sufficient quality of the outputs.

The Commission can have a high level of confidence in this control system as it builds on past experience. The aggregate multiannual error rate for the implementation of Erasmus+ through NAs was 1% for 2019 which was below the 2% materiality threshold. A limited number of suspected frauds (0-2 per year, <500k per year) have been reported during the period 2014-19 indicating a low inherent risk and that the procedures are effective in both limiting and capturing irregularities.

3 Method to determine and update the amount of the Union contribution in the form of lump sums and unit costs

The basis for the determination of the amounts of the Union contribution set out in this Decision are the previous authorising Decisions C(2013)8550 and C(2017)6864, applicable to the Erasmus+ programme 2014-2020. This Decision revises and updates the categories and

³ These are set out in the delegation agreement signed by each national agency and in the National Agency Guide.

amounts of Union contribution set out in the aforementioned Decisions, and provides the reasoning for each update.

A main element taken into account for the update of the amounts defined in 2021 was inflation, calculated on the period between the last update in 2017 (based on 2016 data), and the last available figure for 2020. Thus the initial level of unit cost contributions fixed for the start of the new programme in January 2021 was an adjustment to the market prices in the previous programme period, based on the cumulative EU inflation rate in the period 2017-2020 of 5,8%⁴ (Eurostat data). In addition to the general adjustments based on inflation, further adjustments were made for each budget category based on historical data, expert judgement and stakeholders' feedback collected during the previous programming period.

In preparation for the 2021-2027 programming period, DG EAC and EACEA constituted a working group on funding rules, including officials from all units involved in the design and implementation of the programme, and organised over 30 consultative working groups with National Agency and programme stakeholders. This allowed to collect relevant feedback from all programme countries on the weaknesses in the funding model for the previous programme and proposals for their improvement in the new one.

In addition, specific studies carried out at sectoral level allowed the Commission to assess the adequacy of the levels of support in the different actions of the programme. Both the "Study on the inclusiveness and adequacy of support for student mobility in higher education under the next Erasmus+ Programme" and the "Study on Simplified Grants for the Future European Solidarity Corps and Erasmus+ Youth actions", carried out in 2019-2020, showed the need to increase the levels of support in order to improve the accessibility and inclusiveness of the programme, particularly towards participants with fewer opportunities or special needs.

On this basis the rates for the start of the 2021-2027 period were adopted, while a more quantitative analysis, assessing the adequacy of the unit contributions to the costs actually incurred by beneficiaries, was planned to be carried out later in the programming period to underpin a subsequent update of this Decision.

In the meantime, however, the unexpected drastic increase of inflation rates between January 2021 and August 2022 had a severe impact on the number of participants in mobility actions. Therefore, in order to allow optimal implementation of the program in 2023, a further specific adjustment of 12,27% was considered appropriate for some unit costs, based on the comparative increase of the price indices between January 2021 and July 2022 (latest monthly index available).

As the inflation particularly affected subsistence costs (e.g; food, housing, etc.), this specific adjustment was limited to the individual support rates which were increased accordingly. Other budget categories were not updated at that time, as the additional studies were planned for 2023. I

In 2023, two studies were carried out; the "Study on simplified grants in Erasmus+" and the "Study on financial support of Erasmus+ grants" ("the 2023 studies")⁵ which allowed the Commission to evaluate the appropriateness of the funding for all actions and update the amounts when necessary. They carried out a review of unit costs and lump sums, as defined by the simplified grants, compared to real costs, in order to verify whether the grants ensure

⁴ Source: Eurostat [HICP - inflation rate \[TEC00118\]](#)

⁵ GOPA study reference

appropriate support for the beneficiaries in rolling out their projects and allow adapting to country/area specific circumstances. In this direction, they provided evidence-based elements, drawn from reference documents, official data, sample collection and ad hoc surveys, that assisted the Commission in determining the adequacy of unit cost amounts and lump sums, aiming to ensure that the EU contributions are proportionate to the actual costs sustained by the participants.

The sections below provide the details and the methodology for the determination of the levels of support in each budget category, as well as the specific rules for their application in each of the sectors of the Programme.

3.1 Key Action 1

The eligible categories for Union support in the form of unit contributions under Key Action 1 are the following:

- Travel support
- Organisational support
- Inclusion support for organisations
- Individual support
- Preparatory visits
- Course fees
- Linguistic support
- Project management
- Coaching costs
- Physical events support

3.1.1 Travel Support

The system for the definition of travel support was originally established in decision C(2013)8550 and then revised with decision C(2017)6864, based on the study “Mid-term review of simplified grants used in the Erasmus+ programme”⁶. The 2017 revision aligned the contributions to market prices and targeted an average co-financing rate of 80%.

The 2014-2020 rules on travel support were based on distance bands, so participants had flexibility in the choice of the means of transport, while the amount of the contribution only depended on the travel distance in kilometres. However, the Mid-term review study, which contributed to the update of the levels of support, mainly used flight tickets as a reference for market prices, while alternative means of transport (bus or train) were only included in the analysis for distances below 500 km.

For the 2021-2027 programme, the reduction of the carbon footprint has become a horizontal priority for all mobility activities, in line with the objectives of the European Green Deal⁷. To this end, from 2021 to 2023 participants were given the choice between “standard travel support”, with the same amounts as defined in decision C(2017)6864, and “green travel support” with increased levels of contribution (15% compared to regular travel support) when traveling by a low-emissions means of transport such as train or bus.

As of 2024, the travel support rates have been reviewed based on the study on Erasmus+ funding rules. This study included a methodology for collecting samples of travel itineraries, primarily focusing on flights, and conducted simulations for a wide range of routes, mainly

⁶ <https://eur-lex.europa.eu/legal-content/FR/TXT/?uri=COM:2018:50:FIN>

⁷ https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en

within Europe (but also between Europe and other parts of the world). The simulations contained representative routes, (such as Berlin - Paris, Lisbon - Brussels, etc.), but also incorporated outermost regions, islands, as well as remote region and destinations that pose logistical challenges. Based on the analysis of more than 27,000 valid itineraries, a comparative table was created, incorporating the existing distance bands, along with the corresponding percentage (80%) of average real costs.

To emphasise the importance of green travel, the following action have been taken:

- the standard travel is redefined and call renamed as “non-green travel” and the green travel is presented as the first option for participants to consider.
- The difference in support between non-green and green travel is increased.
- The travel support is introduced in the action “mobility project for students in higher education” for all type of students, thus streamlining the same system across all mobility actions.

To determine the rate applicable for both green travel and non-green travel, the rates suggested by the study have been decreased and increased by 15% respectively in relation to the study results, leading to a difference of at least 30% between both options.

Green travel for distance band between 10km and 99km is now defined. Participants may use their private car, which is not considered as green travel, therefore a distinction between sustainable and other means of transport is necessary.

For the travel band 3000 – 3999 KM, the application of the methodology would have led to a rate identical to the rate applicable since 2021. Consequently, in view of a fair treatment of participants and considering the relevant increase in the other distance bands, it was decided to increase the snon-green travel by EUR 50 and to consider this new amount as a basis for calculation. This adjustment remains below the 80% of the average real costs for this distance band.

Table 1: Travel support

| Travel distances ^[1] | Green travel | Non-green travel |
|---------------------------------|--------------------------|--------------------------|
| Between 10 and 99 KM | 56 EUR per participant | 28 EUR per participant |
| Between 100 and 499 KM | 285 EUR per participant | 211 EUR per participant |
| Between 500 and 1999 KM | 417 EUR per participant | 309 EUR per participant |
| Between 2000 and 2999 KM | 535 EUR per participant | 395 EUR per participant |
| Between 3000 and 3999 KM | 785 EUR per participant | 580 EUR per participant |
| Between 4000 and 7999 KM | 1188 EUR per participant | 1188 EUR per participant |
| 8000 KM or more | 1735 EUR per participant | 1735 EUR per participant |

^[1] Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission (http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm). The distance of a one-way travel must be used to calculate the amount of the EU grant that will support the round trip.

3.1.2 Organisational Support

This category covers all costs directly linked to the implementation of mobility activities for the organisation, excluding subsistence and travel for participants.

The “Study on financial support of Erasmus+ grants”, carried out in 2023, allowed the Commission to assess the adequacy of the levels of organisational support.

Taking as a reference the survey carried out on beneficiaries, for which a high number of responses was obtained, it was possible to evaluate the appropriateness of the organisational support rates granted by programme sector and activity type. Overall, there is the evidence of the adequacy of the comparison between amount received and actual costs (considering the 80% of the total reported cost).

The study identified a need to adjust the rates related to support for the adult education and youth sector, taking into consideration that these activity types require more targeted support to effectively address the overarching goal of promoting inclusion and ensuring equal opportunities for all beneficiaries,. The table below, which includes the new action of staff mobility in the field of sport, summarises the amounts of Union contribution applicable to each action and is followed by a detailed justification for the choice of each amount for each of the sectors.

Table 3: Organisational support

| Action | Amount of Union contribution (per mobility): |
|--|---|
| Mobility of higher education students and staff | 400 EUR per participant; 230 EUR per participant after 100 participants in the same activity |
| Blended Intensive Programmes in higher education | 400 EUR per participant with a minimum of 15 participants (not involved in the delivery of the programme) and a maximum of 20 funded participants |
| <ul style="list-style-type: none">– Group mobility of school pupils– Staff mobility for courses and training– Participation in VET skills competitions– Invited experts– Hosting teachers or educators in training | 100 EUR per participant |

| | |
|---|---|
| – Group mobility of adult learners | 125 EUR per participant |
| – Short-term learning mobility of VET learners – Short-term learning mobility of pupils – Short-term learning mobility of adult learners – Staff mobility for job shadowing and teaching or training assignments – Staff mobility in the field of sport | 350 EUR per participant; 200 EUR after one hundred participants in the same type of activity |
| – Long-term learning mobility of VET learners (ErasmusPro) – Long-term learning mobility of pupils – Long-term learning mobility of adult learners – Activities with non-associated countries in the field of VET | 500 EUR per participant |
| – Mobility projects for young people and youth workers | 125 EUR per participant |

3.1.2.1 Higher Education

i. Students and staff mobility

The main changes compared to decision C(2017)6864 are the update of the amounts on the basis of inflation and of the policy priorities of the new programme.

The amounts of 350 EUR up to the 100th participant and 200 EUR per additional participant, as defined in the Erasmus+ Programme Guide, were increased by 15% and rounded to the closest multiple of 10, which corresponds to the **two new levels of 400 EUR and 230 EUR**.

The 15% increase is calculated as follows:

- 6% due to the inflation rate between 2017 and 2020, as described above;
- 9% due to the additional costs related with the implementation of new requirements from the ECHE Erasmus+ Charter for the period 2021-2027:

- Digital mobility management: Implement the European Student Card Initiative: joining the Erasmus Without Paper Network and adapting internal systems to its technical standards, linking to the Online Learning Agreement, regularly feeding information into the dashboard of the Erasmus+ Mobile App;
- Greening of Erasmus+: promoting environmentally friendly ways of mobility and other activities, handling the proofs of green travel of participants to justify extra funding, greening administrative procedures;
- Inclusion: promoting and encouraging the participation of individuals with fewer opportunities, administratively handling the extra funding for these participants;

- Civic engagement of participants and alumni: identifying and promoting relevant opportunities, matching persons to activities, monitoring activities.
- New mobility features: promoting and managing blended and/or international mobility.

The 9% increase is based on the expert opinion of the Commission as to the estimated additional costs that will be incurred by these new requirements, and after benchmarking against feedback provided by the external stakeholders involved in implementation.

ii. Blended intensive programmes

Blended intensive programmes for students and staff learners is a new activity under the Erasmus+ programme 2021-2027. They will comprise a short-term physical mobility abroad combined with a compulsory virtual component facilitating a collaborative online learning exchange and teamwork. The virtual component will bring the participants together online to work collectively and simultaneously on specific assignments that are integrated in the blended intensive programme and count towards the overall learning outcomes.

For Blended Intensive Programmes, as in the other actions in the field of Higher Education the amount of organisational support is set at **400 EUR per participant**, with a minimum number of 15 and a maximum of 20 participants (not involved in the delivery of the programme).

In this action, organisational support is intended to cover costs related to the preparation, design, development, implementation and follow-up of the programme and delivery of virtual/remote activities as well as the overall management and coordination. Costs may include: production of documents or educational material, rental of rooms, rental of equipment, field trips, excursions, communication activities, translation and interpretation, preparatory visits and administrative tasks. The level of the administrative effort for the organisation of such activities can be considered as similar to the organisation of a regular mobility action. Therefore, the level of contribution under the category “Organisational support” is the same as in the mobility activities for Higher Education students and staff, i.e. 400 EUR per participant.

The limitation in the number of funded participants is due to the high number of fixed costs in the typical budget for the organisation of a blended intensive programme: it is considered that an amount of 8 000 EUR, corresponding to 20 funded participants, can cover the costs for the organisation of a programme even if the actual number of participants is higher.

3.1.2.2 VET, School Education, Adult Education

Compared to the 2014-2020 period, where there was one single amount for organisational support, there will be differentiated amounts during the 2021-2027 period, taking into account the different nature of organisational costs for each type of activity. The amounts were determined on the basis of an analysis of the tasks that beneficiary organisations implement for each type of activity.

Building on the experience acquired during the programming period 2014-2020, it has been found that different levels of Union contribution are appropriate to reflect the nature and complexity of the organisational workload required for each mobility type and to ensure the good quality of organised activities and the capacity of organisations to operate internationally and to acquire the necessary knowledge and experience.

As a result, as opposed to the period 2014-2020, with the same amount of 350 EUR per participant attributed to all activities, the new scheme for the 2021-2027 programme includes four different amounts, corresponding to the levels of organisational effort required for each type of actions. An increased level of organisational support is applied to more complex

activities where there are fewer participants and less opportunity for economies of scale, whereas a lower contribution is applied for courses and group activities where there is a large number of participants and better potential for operational savings. As an overall result, the expected total expenditure of the programme on organisational should be lower, while still providing the correct funding across the board.

As detailed in Table 3: Organisational support above, the new amounts are 100 EUR, 125 EUR, 350 EUR and 500 EUR. These amounts are based on the expert opinion of the Commission, taking into account experience gained from implementing the actions in the previous programming period and after benchmarking against feedback from stakeholders on the actual costs incurred, and are confirmed by the 2023 studies.

This has shown that lower costs per participant are associated with the organisation of group activities, as in the case of school pupils' mobility, due to the existence of economies of scale. The costs are also lower when the purpose of the mobility is the participation to an activity which was organised by external entity, as in the case of courses, or for the simple invitation of an expert to an activity hosted by the beneficiary. The reduced level of support of **100 EUR per participant** was introduced for these three types of activities. The amount corresponding to the group mobility of adult learners has been adjusted following the 2023 studies' findings, which showed a specific need to increase it, as a survey to beneficiaries clearly demonstrated that for this category, the amount of actual costs incurred in projects (80%) was higher than the amount received.

The basic amount used in the 2014-2020 period, **350 EUR per participant**, is maintained for activities requiring a medium organisational effort, such as short-term mobility for VET learners and school pupils, as well as for job shadowing and teaching and training assignments.

Long-term mobility of learners and activities with non-associated countries require an additional organisational effort. Such activities require the definition of a very detailed training plan, intense monitoring and generally higher efforts in terms of logistic arrangements (such as, for instance, costs for visas and/or vaccines). These activities are also highly individualised and involve fewer participants, which reduces the opportunities for economies of scale. For this type of activities, the increased level of support of **500 EUR per participant** applies.

3.1.2.3 Youth

In the Erasmus+ 2014-2020 programme, organisational support was a contribution to costs incurred by organisations related to the preparation, implementation and follow-up of activities. Only in the case of activities in the field of youth, organisational support also covered: subsistence and local transport of participants – renting of premises – training and teaching materials - costs related to trainers, speakers, moderators, lecturers.

In substance, in the Youth field, one single contribution covered both the cost for the organisation and for the mobility activities as such, as opposed to the other sectors where those activities were covered by two separate budget categories/ contributions. The proposed approach for the 2021-2027 period is to align the funding model to the other sectors and have two categories/contributions, one covering preparation, implementation, follow-up, trainers/facilitators costs, rental of rooms and one for subsistence. This approach will:

- Bring consistency across all KA1 Actions of the Erasmus+ Programme;

- Allow to finance blended activities⁸, where only organisational support is eligible for the virtual components;
- Provide funding visibility for the activities implemented on top of the mobility activities;
- Provide further flexibility in case of drop-outs;
- Bring in a simpler logic by reducing the complexity of eligible costs covered by the grant item.

Mobility activities in the field of youth are comparable in terms of complexity and organisational effort to the group mobility activities in the fields of School Education, VET and Adult Education. As explained in the section above, group activities in general are associated with lower organisational costs and benefit from economies of scale. Moreover, the 2023 studies, following a detailed survey on beneficiaries, demonstrated that for youth organisations, the amount of actual costs related to organizational support incurred in projects (80%) was higher than the amount received.

Therefore, the level of unit contribution for youth mobility was fixed at **125 EUR per participant**.

3.1.3 Inclusion Support for Organisations

The inclusion support is a contribution to costs incurred by organising institutions related to the preparation, implementation and follow-up of activities in support of (incoming and outbound) participants with fewer opportunities. The individual activities may vary from case to case but they essentially apply to supplementary tasks carried out by projects that aim to actively involve participants with fewer opportunities (providing tailor-made preparation, support and follow-up for them, such as reinforced mentorship).

The new cost category for inclusion support is composed of one unit contribution intended to support the organisation in the extra costs incurred for the participation of people with fewer opportunities and one component based on real costs, to cover the direct needs of those participants.

The component intended for the organisation was initially set as a fixed amount of **100 EUR** per eligible participant for all sectors.

Typical examples of expenses covered by this category are the following:

- Administrative costs of determining the participant's status, type of fewer opportunities and individual needs
- Estimating and processing costs that need to be covered in non-standard ways (real costs as opposed to unit costs)
- Individualised preparation / pre-departure training for the participant
- Dedicated assistance with logistical arrangements and possible accompanying persons or assistants
- Identifying suitable hosting institutions (this is a standard organisational task but its difficulty is significantly increased because not all potential hosting partner institutions are able or willing to host participants that require stronger individual engagement)
- Additional preparation of staff on hosting side to address the specific needs of the participant

⁸ Blended learning: study type that involves learning in a combination of modes. Often used more specifically to refer to courses which use a combination of traditional face-to-face teaching work-shops or seminars, and distance learning techniques on-line (such as internet, television, conference calls).

The actual costs of the activities listed above are strongly variable by nature and do not allow to achieve economies of scale, as they depend on the specific situation and needs of each eligible participant. This cost category was introduced for the first time in the new programme, and in absence of statistical data supporting the analysis, the determination of 100 EUR as the amount of contribution was based on an expert judgment by the Commission, benchmarked against feedback from National Agencies and other stakeholders. The 2023 studies further analysed this component and proposed the adjustment by considering the following elements:

- Market reliable average price of related costs
- Extra cost needed for participants with fewer opportunities especially concerning human resources (extra mentors).
- Inflation (between January 2021 and February 2023; equal to 16.58% on EU average)

Further reinforce the commitment with the transversal inclusion priority On this basis, it is considered appropriate to raise this amount to 125 EUR per participant, to better support the extra costs of organising activities involving participants with fewer opportunities.

3.1.4 Individual Support

The category “Individual support” is intended to cover costs directly linked to the subsistence of participants during the activity. In general, the amounts of support depend on the receiving country for the mobility activity.

3.1.4.1 Higher Education

i. Long-term mobility of students and recent graduates

Regarding the cost category “individual support”, different updates were applied to the grant levels for students and for staff throughout recent years. As pointed out by the “Study on the inclusiveness and adequacy of support for student mobility in higher education under the next Erasmus+ Programme”⁹, the overall EU grant (all cost categories included) covered between 34% and 42% of the overall mobility costs incurred by students in the period 2014-2020. One of the scenarios presented by the study proposed to increase all grant levels by 5%, as an adjustment to cumulative inflation during the period 2014 – 2018.

However, in order to make the update of the grant levels more relevant to the programming period 2021-2027, the adjustment took into account the inflation rate for the period 2017-2020, corresponding to 6%¹⁰, as described in section 3 above. In addition, the results of the study mentioned above showed that a further increase in the level of contribution would improve the accessibility of the programme for all participants, but in particular for those who have limited own resources to complement the Erasmus+ grants. Therefore, the levels of individual support were increased by 15% in order to contribute to the objective to increase the inclusiveness of the programme, while it is estimated that the Union contribution will remain below 80% of the eligible costs (which themselves are only a part of the actual costs incurred by students (see above)). A further adjustment was necessary to take into account the inflation rate for the period 2021-July 2022, corresponding to 12,27 %, as described in section 3 above.

As of 2024, the rates have been reviewed based on the 2023 studies on Erasmus+ funding rules, which proposed an update to the categorisation of the listed countries, based on the average cost of living.

To confirm whether and to what extent a modification of the current country groups was needed, due to recent inflation, the studies carried out a comparison of the overall cost of living and income levels, using various official economic data published by Eurostat, OECD and the World Bank. It compared cost of living in the various EU Member States and third countries associated to the Programme, and third countries not associated to the Programme by considering the initial group classification.

Three different indicators were used to explore how sensitive the country classification is to the indicator used to capture cost of living:

- a. Price Level Indices
- b. Median Income
- c. GDP per capita

It is worth noting that the suggested values and ranges in Table 4 express the individual support in relation to costs of living in the various countries to cover the subsistence (accommodation, meals) and do not include travel costs, which are reimbursed in accordance with section 3.1.1 via a specific budget item, and not as part of the individual support. Up to now, students in higher education were the only target group that did not receive a specific contribution to their travel costs to and from their mobility destination within Europe, as travel costs were supposed to be covered within the individual rates. Consequently, with the recent strong pressure on costs,

⁹ Ares(2020)3694813

¹⁰ Source: Eurostat - Ref. footnote 4 above

as the 2023 studies also confirmed, higher education students did not receive enough support for travel and the system was unfair compared to other sectors.

Against this background, this adjustment will not only ensure visible and significant increase of support for higher education students' mobility but will also help to better identify the support for each type of costs and will streamline the management of travel costs across all actions of the Programme allowing students to fully use their monthly grant for costs related to accommodation and meals.

The increased level of "individual support", combined with the cost category of "inclusion support" is also intended to facilitate participation in the programme for participants who cannot afford to cover a high proportion of the cost of mobility with own resources.

Table 4: Individual support for HE students and recent graduates

| Origin/ Destination | Group 1: Austria, Belgium, France, Denmark, Finland, Germany, Iceland, Ireland, Italy, Liechtenstein, Luxembourg, Netherlands, Norway, Sweden, | Group 2: Cyprus, Czechia, Estonia, , Greece, Latvia, Malta, , Portugal, Slovakia, Slovenia, Spain | Group 3: Bulgaria, Croatia, Hungary, , Lithuania, Poland, Romania, Serbia, North Macedonia, Turkiye |
|---|---|---|---|
| Group 1: Austria, Belgium, France, Denmark, Finland, Germany, Iceland, Ireland, Italy, Liechtenstein, Luxembourg, Netherlands, Norway, Sweden, | Between 292 and 606 EUR | Between 225 and 550 EUR | Between 225 and 550 EUR |
| Group 2: Cyprus, Czechia, Estonia, , Greece, Latvia, Malta, , Portugal, Slovakia, Slovenia, Spain | Between 348 and 674 EUR | Between 292 and 606 EUR | Between 225 and 550 EUR |
| Group 3: Bulgaria, Croatia, Hungary, , Lithuania, Poland, Romania, Serbia, North Macedonia, Turkiye | Between 348 and 674 EUR | Between 348 and 674 EUR | Between 292 and 606 EUR |

ii. Top up for students and recent graduates with fewer opportunities

Decision C(2013)8550 defined the amount as a range between 100 EUR and 200 EUR per month. As specified above, the average co-financing rate for Higher Education students in mobility was estimated between 34% and 42% in the 2014-2020 period.

In the new programme, reflecting the horizontal priority of inclusion, the level of support for this category of participants shall be increased. The general increase in the level of individual support is already expected to raise the average co-financing to at least 50% for all students. This additional top-up is expected to bring the level of co-financing above 60% for the specific category of students with fewer opportunities, whose definition is set out in the Programme Guide.

The amount is differentiated according to the duration of the activity:

- Long term mobility: the amount is increased to 250 EUR.
- Short term mobility: 100 EUR for a physical mobility activity period of 5-14 days and 150 EUR for a period of 15-30 days

iii. Top up for students and recent graduates in traineeships

Decision C(2013)8550 defined the amount as a range between 100 EUR and 200 EUR per month. In the new programme, in order to simplify and harmonise the approach for all countries, an initial fixed rate was established at the middle value of 150 EUR per month.

The “Study on financial support of Erasmus+ grants” of 2023 showed that a large majority of surveyed organizations believe that this top up amount is sufficient to cover actual costs. In this direction, the amount is maintained.

iv. Students and recent graduates from outermost regions and OCTs

In line with decision C(2013)8550, students and recent graduates from outermost regions and OCTs receive a higher amount of individual support due to geographical disadvantages. In order to simplify the previous scheme, the distinction by Country group was eliminated and the level of support is 786 EUR for all participants in this category, corresponding to the middle value used in the previous programme.

v. Short term mobility of students and recent graduates

The determination of the amount of support was based on the “study on the inclusiveness and adequacy of support for student mobility in higher education under the next Erasmus+ Programme” undertaken by the PPMI Group. The study itself used as a reference the rates from the short-term blended mobility in the framework of “Learning, Teaching and Training activities” (LTTs) under the Erasmus+ KA2 Strategic Partnerships action. In fact, those activities are very similar in terms of logistic arrangements and related costs. The main difference is that under LTTs, as for all KA2 activities, travel support is calculated separately. In short term-mobility under KA1, instead, in order to ensure consistency within the action, the costs of travel should be covered by the same category of individual support.

The levels of support for short-term blended mobilities under LTTs in KA2, as defined in decision C(2017)6864, are the following:

- Up to the 14th day of activity: 58 EUR per day
- From 15th to the 30th day of activity: 42 EUR per day

During the 2014-2020 period, 10 719 Higher Education students participated in short-term blended mobility activities. The average duration of an activity was 8 days, corresponding to an allowance of 464 EUR, while the average distance travelled was 1 040 Km, corresponding

to an allowance of 275 EUR ¹¹. Based on these data, the average incidence of travel on the grant amount per mobility is about 60%.

| KA2 short-term blended mobility 2014-2020 | |
|--|---|
| Level of support | - Up to the 14th day of activity: 58 EUR per day - From 15th to the 30th day of activity: 42 EUR per day |
| Average grant per participant | 760 EUR |
| Average distance | 1 040 Km |
| Average travel support | 275 EUR |
| Average duration | 8 days |
| Average individual support | 464 EUR |

As pointed out above, the average level of co-financing in mobility actions for students in Higher Education was between 34% and 42% in the 2014-2020 period and the objective for the new programme is to bring it to 50-60%, as opposed to KA2 actions, where co-financing is generally estimated at 80%. The difference is due to the availability of additional sources of funding from national and regional schemes in KA1, which are not available in KA2. To reflect this difference, the new unit contribution for short term mobility is defined as follows:

| KA1 short-term mobility 2021-2027 | |
|--|---|
| Level of support | - Up to the 14th day of activity: 79 EUR per day - From 15th to the 30th day of activity: 56 EUR per day |
| | |

The average grant level is lower than in the case of KA2 blended mobility, which is in line with the targeted difference in the levels of co-financing between the two actions.

- vi. *Mobility between Programme and non-associated countries – students and recent graduates*

The rates determined by Decision C(2014)6158, as amended by Decision C(2017)6863 and detailed in the Erasmus+ Programme Guide 2018 are confirmed.

¹¹ Source: Erasmus+ Dashboard

The three categories of listed countries have been updated, according to the average cost of living, as explained in section 3.1.4.1 above.

| From | To | Amount |
|--|--|---|
| EU Member States and third countries associated to the Programme | Third countries not associated to the Programme from Regions 1-12. | 700 EUR per month |
| EU Member States and third countries associated to the Programme | Third countries not associated to the Programme from Regions 13 and 14. | As described above in section “Grant support for the mobility of students – Individual support for physical mobility” |
| Third countries not associated to the Programme from Regions 1-12. | Group 1: Austria, Belgium, France, Denmark, Finland, Germany, Iceland, Ireland, Italy, Liechtenstein, Luxembourg, Netherlands, Norway, Sweden, | 900 EUR per month |
| | Group 2: Cyprus, Czechia, Estonia, , Greece, Latvia, Malta, , Portugal, Slovakia, Slovenia, Spain | 850 EUR per month |
| | Group 3: Bulgaria, Croatia, Hungary, , Lithuania, Poland, Romania, Serbia, North Macedonia, Turkiye | 800 EUR per month |

The base rate of 700 EUR per month is maintained for all mobility activities from all EU member states and countries associated to the programme to all third countries non-associated to the programme, except for regions 13 and 14.

Mobility from and towards non-associated countries that are within the geographical zone of Programme countries (regions 13 and 14), namely Andorra, Faroe Islands, Monaco, San Marino, Switzerland, United Kingdom, and Vatican City is supported with the same rates as intra-EU mobility¹².

In particular, group 1 includes Faroe Islands by analogy with Denmark, Switzerland by analogy with Liechtenstein, and the United Kingdom in continuity with the previous programming period. Andorra, Monaco, San Marino and Vatican City are also included in group 1 by analogy with France and Italy.

Mobility activities from and to the countries listed above, by analogy with intra-EU mobility, are not eligible for travel support.

¹² In addition to the geographical criterion, these countries are treated as an exception as they are not covered by the External Action Instruments

Staff mobility

Evidence from the programming period 2014-2020 and feedback from stakeholders showed that the considerations made for student mobility do not equally apply to staff mobility, where the levels of funding are higher and sending institutions generally ensure that all sources of funding combined (EU and national) cover the actual costs incurred by participants. In addition, the existence of ranges allows the national authorities to adjust the actual grant amounts to the specific needs. The initial lower end rates set in Decision C(2017)6864 were adjusted on the base of the inflation rate of the period between 2021 and July 2022.

Ranges were further updated with the inflation rate over the period July 2022-May 2023. Calculation was based on the HICP EU 27 countries which was equal to 126,35 in April 2023 and 119,31 in July 2022 thus producing an average rate equal to 5,9%

Table 5 presents the granted amount according to the new cluster of countries.

Table 5: Individual support for HE staff

| | Staff from Programme Countries | Staff from Partner Countries |
|---|--------------------------------------|------------------------------------|
| Receiving country | Min-Max (per day) | Amount (per day) |
| Austria, Belgium, France, Denmark, Finland, Germany, Iceland, Ireland, Italy, Liechtenstein, Luxembourg, Netherlands, Norway, Sweden | 96-190 | 190 |
| Cyprus, Czechia, Estonia, , Greece, Latvia, Malta, , Portugal, Slovakia, Slovenia, Spain | 84-170 | 170 |
| Bulgaria, Croatia, Hungary, , Lithuania, Poland, Romania, Serbia, North Macedonia, Turkiye | 71-148 | 148 |
| Partner Countries Regions 13, 14 | 190 | Not eligible |

3.1.4.2 Mobility projects for VET learners and staff, School education pupils and staff, Adult education learners and staff

For VET learners and staff, School education pupils and staff, and Adult education learners and staff, the amounts of contribution are based on Decision C(2013)8550, amended by C(2017)6864.

The programme guides for the period 2014-2020 offered a minimum and a maximum level of support and each National Agency selected its own actual level within that range, based on factors such as number of beneficiaries, availability of other sources of funding and more accurate estimates on the costs of living. The average grant level in the period was always falling between 60% and 100% of the maximum value in the range¹³.

For the new programme, the range of contribution levels available to national agencies for individual support was reduced by increasing the lower end of the range by 10%, while leaving the higher end unchanged. This increased amount results from a combination of the adjustment to inflation (6%) and an additional increase aimed to improve the inclusiveness of the programme, as described above. A further adjustment of the lower end of the range was necessary to take into account the inflation rate for the period 2021-June 2022, corresponding to 12,27 %, as described in section 3 above.

An additional update was made in 2023, based on inflation (5,9% as described in the previous section above). Moreover, an alignment of the minimum amount for school pupils and VET learners was deemed necessary, due to the similar nature of such mobilities.

The three categories of listed countries have been updated, according to the average cost of living, as explained in section 3.1.4.1 above.

The resulting update of the levels of support is presented below:

| Category of participants | Country group 1 ¹⁴ | Country group 2 | Country group 3 |
|--------------------------------|-------------------------------|-----------------|-----------------|
| Staff | 107-191 EUR | 95-169 EUR | 84-148 EUR |
| VET / Adult education learners | 48-127 EUR | 41-110 EUR | 36-93 EUR |
| School pupils | 48-85 EUR | 41-74 EUR | 36-64 EUR |

The above are base rates per day of activity. Each NA will decide on exact base rates based on the allowed ranges.

The base rate is payable up to the 14th day of activity. From the 15th day of activity, the payable rate will be equal to 70% of the base rate.

Non-associated countries have been attributed to the three country groups in use for intra-EU mobility, as detailed in footnote 16. The attribution was done by adding up the amount of daily allowance and accommodation allowance calculated by the MIPS system for travel of EU officials and applying 80% as an average co-financing rate.

¹³ Source: Erasmus+ Dashboard

¹⁴ For Programme Countries

Country group 1: Austria, Belgium, France, Denmark, Finland, Germany, Iceland, Ireland, Italy, Liechtenstein, Luxembourg, Netherlands, Norway, Sweden

Country group 2: Cyprus, Czechia, Estonia, Greece, Latvia, Malta, Portugal, Slovakia, Slovenia, Spain

Country group 3: Bulgaria, Croatia, Hungary, Lithuania, Poland, Romania, Serbia, North Macedonia, Türkiye

For non-associated Countries

Country group 1: Australia, Canada, Japan, Israel, South Korea, Georgia, Argentina, Armenia, Angola, Saudi Arabia, Kuwait, United States, Bahrain, Azerbaijan, Sudan, Saint Kitts & Nevis, St. Vincent & Grenadines, United Arab Emirates, Hong Kong, Lebanon, Vietnam, Mexico, Singapore, Thailand, Taiwan, Moldova, Malaysia, Tanzania, Switzerland, United Kingdom, Faroe Islands, South Sudan, State of Palestine, Vatican City State, Monaco, San Marino, Andorra

Country group 2: India, Kazakhstan, Brazil, DR Congo, Chile, Nigeria, Uganda, Liberia, Djibouti, DPR Korea, Uzbekistan, Turkmenistan, Dominican Republic, Jamaica, Belarus, Libya, Syria, Cuba, Yemen, Kenya, Rwanda, Seychelles, Antigua and Barbuda, Brunei, Montenegro, Switzerland, Malawi, Barbados, Saint Lucia, Grenada, Dominica, Uruguay, Albania, China, Philippines, Peru, Venezuela, Panama, Ghana, Chad, Guyana, Egypt, Morocco, Kiribati, Oman, Bosnia and Herzegovina, Iran, Mozambique, Senegal, Mauritius, Qatar, Andorra, Jordan, Indonesia, Laos, South Africa, Ethiopia, Bangladesh, Ecuador, Paraguay, Costa Rica, Ivory Coast, Sierra Leone, Gabon, Haiti, Bahamas, Papua New Guinea, Micronesia, Ukraine, Kyrgyzstan, Russia

Country group 3: Nepal, Maldives, Tajikistan, Nicaragua, Zambia, Guinea, Congo, Botswana, Belize, Samoa, Marshall Islands, Palau, Tuvalu, Nauru, Cook Islands, Niue, New Zealand, Pakistan, Bhutan, El Salvador, Suriname, Guatemala, Honduras, Somalia, Trinidad and Tobago, Algeria, Columbia, Gambia, Fiji, Solomon Islands, Vanuatu, Cambodia, Zimbabwe, Burundi, Mongolia, Cameroon, Timor-Leste, Sri Lanka, Madagascar, Mali, Togo, Sao Tome & Principe, Tonga, Bolivia, Benin, Lesotho, Macao, Tunisia, Iraq, Burkina Faso, Equatorial Guinea, Central African Republic, Guinea-Bissau, Namibia, Comoros, Eritrea, Myanmar, Afghanistan, Niger, Mauritania, Cabo Verde, Kosovo, Eswatini

i. Determination of the amounts of unit contribution for School pupils mobility

In the programme 2014-2020 the mobility of School pupils was allowed within the framework of partnership projects under KA2. For the 2021-2027 period, in order to ensure more coherence within the programme, these activities will be financed under KA1.

In order to harmonise the structure of the rules, the level of individual support, which was presented as a single amount in the old KA2 School exchange partnerships, had to be transformed into a range within which National Agency can choose their own level of support, as in the typical KA1 mechanism.

The base for calculation, corresponding to the unit contribution for “individual support” for the same type of activities under KA2 in the Erasmus+ programme 2014-2020, is 58 EUR.

This base is taken as equivalent to the average KA1 VET learner rate in a mid-income country (group 2).

The average rate for country groups 1 and 3 is then calculated based on the same deviation from country group 2 as used for VET learners (+/-18.06%)”

| <i>Step 1</i> | Avg. country group 1 | Avg. country group 2 (base) | Avg. country group 3 |
|---------------|----------------------|------------------------------------|----------------------|
| VET learners | 85 (+18.06%) | 72 | 59 (-18.06%) |
| School pupils | 68 | 58 | 48 |

In the second step, the ranges are created for the three country groups to align the approach with the other types of participants in Key Action 1. In order to take into account the possibility to obtain economies of scale when large groups of pupils take part to a mobility activity, as well as the existence of other sources of funding, the lower end of the range is calculated as 40% less than the average rate, while the higher end is calculated as 15% more than the average. This flexibility is important in case of pupil mobility activities because pupils from different countries typically take part in activities at the same venue during multilateral exchanges. In the final step, rates are rounded to the nearest 10.

| <i>Step 2</i> | Average (base) | Range | Low | High |
|-----------------|-----------------------|------------------------|------------|-------------|
| Country group 1 | 68 | - 40% ; + 15%; rounded | 40 | 80 |
| Country group 2 | 58 | - 40% ; + 15%; rounded | 35 | 70 |
| Country group 3 | 48 | - 40% ; + 15%; rounded | 30 | 60 |

3.1.4.3 Youth exchanges, mobility of Youth workers and Youth participation activities

The contributions are based on Decisions C(2013)8550, amended by C(2017)6864. The funding mechanism was aligned with the other sectors, by separating the items “organisational support”, covered in the dedicated section above, and “individual support”.

i. Individual support for Youth exchanges, Youth workers and Youth participation activities

As mentioned in the section on organisational support above, in the previous programming period, the category “organisational support” in the field of youth included both the costs related to the actual organisation of the activity and the subsistence costs for participants, which were falling under the category “individual support” in all the other sectors of the programme. As a result, the overall levels of support for activities in this field were significantly lower than in the other fields. As the Interim report from the “Study on Simplified Grants for the Future Humanitarian Aid Strand of the European Solidarity Corps and Erasmus+ Youth Participation Activities” pointed out, “both beneficiaries and NAs thought that the amount to support participants with accommodation and subsistence needs to be increased to better reflect the increase in costs of living in many countries”¹⁵.

In a logic of harmonisation of the programme rules, the old category “organisational support”, where the determination of the amounts of support was based on the cost of living in receiving countries, was translated into “individual support” for the new programme. Meanwhile, the component which is specifically intended to cover the organisational costs is now covered by the category “organisational support” described in the dedicated section above.

In order to assess the appropriates of individual support for youth, the 2023 studies carried out a market analysis to collect data in order to provide an estimate of subsistence costs as well as two different surveys, one provided to the beneficiaries and the other to the Erasmus+ National Agencies, with the aim of gathering opinions about the adequacy of the individual support and to inquire the amounts that they considered adequate to cover subsistence costs of participants in these activities.

As a result, following triangulation of the findings and considering that individual support cannot exceed 80% of real costs, the increased levels of contribution are listed in the following tables.

Table 6: Individual support for Youth exchanges and Youth workers

| | Youth Exchanges (per day) | Mobility of Youth Workers (per day) |
|----------|----------------------------|--------------------------------------|
| Austria | 78 € | 84 € |
| Belgium | 78€ | 88 € |
| Bulgaria | 45€ | 60 € |
| Croatia | 57€ | 75 € |
| Cyprus | 63€ | 81 € |
| Czechia | 53 € | 65 € |
| Denmark | 81 € | 95 € |
| Estonia | 48 € | 76 € |

¹⁵ In the context of the EAC-02-2019 framework service contract <https://etendering.ted.europa.eu/cft/cft-display.html?cftId=4820>

| | | |
|-----------------------------------|------|------|
| Finland | 79 € | 93 € |
| North Macedonia | 41 € | 57 € |
| France | 67 € | 85 € |
| Germany | 71 € | 77 € |
| Greece | 68 € | 80 € |
| Hungary | 60 € | 77 € |
| Iceland | 76 € | 99 € |
| Ireland | 73 € | 91 € |
| Italy | 69 € | 85 € |
| Latvia | 48 € | 66 € |
| Liechtenstein | 77 € | 84 € |
| Lithuania | 49 € | 65 € |
| Luxembourg | 77 € | 84 € |
| Malta | 57 € | 77 € |
| Netherlands | 69 € | 92 € |
| Norway | 83 € | 94 € |
| Poland | 51 € | 68 € |
| Portugal | 57 € | 78 € |
| Romania | 46 € | 64 € |
| Serbia | 47 € | 59 € |
| Slovakia | 48 € | 67 € |
| Slovenia | 54 € | 78 € |
| Spain | 58 € | 81 € |
| Sweden | 72 € | 87 € |
| Türkiye | 50 € | 68 € |
| Neighbouring Partner Countries | 44 € | 62 € |

3.1.4.4 Mobility of staff in the field of sport

In order to cover costs of subsistence for participants and accompanying persons during the activity, and given the similarities in the type of profile of these target groups, individual support for staff in the field of sport is provided according to the rules set for adult education staff (see paragraph 3.1.4.2 above)

3.1.5 Preparatory Visits

In the 2014-2020 programme, organisations taking part in actions in the fields of VET and Youth had the possibility to carry out “Advance planning visits” to the country of the receiving organisations, with the purpose to ensure high quality activities by facilitating and preparing curricular and administrative arrangements, building trust and understanding and setting-up a solid partnership between organisations involved. Such activities receive contributions calculated on the basis of the applicable unit costs, namely travel and individual support in the case of VET, travel and organisational support in the case of Youth.

For the programme 2021-2027, this activity – under the simpler title of “Preparatory visits” will be available for VET, School Education, Adult Education and Youth.

In order to reduce the administrative burden for organisations taking part in such visits, the contribution will take the form of a fixed amount per participant, covering all categories of expenses.

The method for the determination of the amount of contribution is based on the budget item “Transnational project meetings” for Strategic Partnerships under KA2 in the Erasmus+ 2014-2020 programme. This category in KA2 covers the participation in meetings between project partners for implementation and coordination purposes. The contribution is intended to cover both travel and subsistence costs.

Preparatory visits in KA1 are a similar activity with a comparable cost structure, as they consist in short stays abroad of the staff of beneficiary organisations with the purpose to meet partners in a transnational project.

In KA2 Strategic partnerships, the amount of contribution for transnational project meetings was **575 EUR per participant**. The same amount of contribution was initially established for preparatory visits **in the fields of VET, School Education, Adult Education and Youth**.

The 2023 studies concluded that, for preparatory visits, the amount provided per participant per visit required further adjustments in relation to the real costs identified, notably when the number of preparatory visits increases from 1 to 5 visits. Ranges were therefore further updated with the inflation rate over the period January 2021-May 2023. The calculation was based on the HICP rate for EU 27 countries which was equal to 126,35 in April 2023 and 106,27 in January 2021, thus producing an average rate equal to 18,89%

Consequently, the new funding amount (rounded for practical reasons) is **680 EUR** per participant.

3.1.6 Course Fees

Based on contribution set in Decision C(2013)8550. Increased by 6% due to the inflation rate, as described above, and an additional 8% to increase the level of co-financing in favour of beneficiaries, in line with the inclusion priority of the new programme.

New rate: **80 EUR** per day, with a maximum of **800 EUR**.

3.1.7 Linguistic Support

The Erasmus+ Online Language Support (OLS) will allow participants in mobility activities to assess, practice and improve their knowledge of the language to be used during their experience abroad. The platform will provide features such as assisted and blended learning tools to enable teachers and youth workers to provide extra support to their learners and social networking to enable collaborative learning. The Erasmus+ Online Linguistic Support (OLS) will also provide free language learning material.

The cost category “Linguistic support” is intended for participants who are eligible to benefit from the OLS tool, but whose learning needs are not met by this tool as the required language or level is not available.

The amount of contribution is the same as defined in Decision C(2013)8550: **150 EUR per participant** eligible for Online Language Support that cannot receive it, excluding staff in mobility up to 30 days of duration. For learners, the availability of the support is not linked to

the duration of the mobility, as it is assumed that all periods of mobility require a linguistic support.

For the 2021-2027 period, a higher level of contribution is introduced for participants in ErasmusPro and long-term individual mobility of school pupils, in consideration of the higher complexity of the activities carried out during the mobility. In the case of ErasmusPro, this entails a period learning abroad at a partner VET provider, in a company, or in another organisation active in the field of VET or the labour market. The learning period must include a strong work-based component and an individual learning programme must be defined for each participant.

In the case of school pupils on long-term mobility, participants spend a period abroad to study at a partner school or perform a traineeship at another relevant organisation abroad. Also in this case, an individual learning programme must be defined for each participant to enable them to follow the curriculum and integrate at their host school.

In view of the above, **linguistic support for participants in ErasmusPro and long term individual mobility of school pupils will be supported with an additional 150 EUR per participant.** The determination of this amount was based on the expert judgment of the Commission, benchmarked against feedback from stakeholders. It is intended to cover the additional needs of participants who are minors or very young adults starting from a lower level of proficiency (compared to e.g. higher education students) and need a strong, individualised linguistic preparation in order to be able to undertake their mobility. In case OLS is not available, these learners will receive both the regular linguistic support grant to replace OLS and the additional 150 EUR grant to cover their specific needs.

3.1.8 Categories only applicable to Youth Participation Activities

Youth Participation Activities are non-formal learning activities revolving around active participation of young people. Such activities aim to enable young people to experience exchanges, cooperation, cultural and civic action. Supported activities should help the participants strengthen their personal, social, citizenship and digital competences and become active European citizens.

Supported activities can take the form of (or a combination of): workshops, debates, role-plays, simulations, use of digital tools (e.g. digital democracy tools), awareness raising campaigns, trainings, meetings and other forms of online or offline interaction between young people and decision-makers, consultations, information events etc.

As the mobility component is central in the structure of this action, it is financed under Key Action 1 of the program. However, the action also supports a dimension of transnational cooperation, which results in similarities with the structure of Key Action 2 actions. To reflect such characteristics of this action, three new budget categories are introduced, replicating similar categories already existing in KA2:

- Project management
- Coaching costs
- Physical events support

3.1.8.1 Project management

The organisation of Youth participation activities does not only consist in setting up the logistic arrangements for a mobility, but involves preparation, implementation, of activities, evaluation,

dissemination and follow-up. In this respect, the typical KA1 “organisational support” unit contribution, based on the number of participants, does not reflect the nature of the funded activities and a contribution based on the duration of the project in months was found to be more adequate.

The cost category “Project management and implementation” under KA2 cooperation partnerships is intended to cover coordination and communication between partners, learning/teaching/training materials, tools, approaches etc. Virtual cooperation and local project activities. Its scope is very similar to project management in Youth participation activities and the rule of allocation is based on the project duration in months.

Based on these considerations, the amount of unit contribution for project management in Youth participation activities is defined as the same amount set out in decision C(2013)8550, as amended by C(2017)6864 for “Project management and implementation” in KA2 and it is set at **500 EUR** per month.

3.1.8.2 Coaching costs

This cost category covers the costs linked to the involvement of a coach in the project.

In this element too, the action presents a similarity with KA2 cooperation partnerships. The participation of a coach to the activity constitutes a staff cost, whose structure is compatible with the cost category “intellectual outputs” in the 2014-2020 programme, renamed as “project results” in the new programme.

The Erasmus+ Programme guide defines a Youth worker as “a professional or a volunteer involved in non-formal learning who supports young people in their personal socio-educational, and professional development” and a coach as “a resource person who could have youth work experience to accompany groups of young people (especially those with fewer opportunities), helping them put their idea in practice, supporting them in the preparation, implementation and evaluation of their project”. Based on these definitions, the responsibilities of the two profiles can be considered as similar and the same unit contribution per day can be applied, corresponding to the category “Teacher/Trainer/Researcher/Youth worker” in KA2 cooperation partnerships.

The three categories of listed countries have been updated, according to the average cost of living, as explained in section 3.1.4.1 above.

Table 7: Coaching costs

| | Teacher/Trainer/Researcher / Youth worker Unit contribution per day |
|---|--|
| Austria, Belgium, France, Denmark, Finland, Germany, Iceland, Ireland, Italy, Liechtenstein, Luxembourg, Netherlands, Norway, Sweden | 241 |
| Cyprus, Czechia, Estonia, , Greece, Latvia, Malta, , | 137 |

| | |
|--|----|
| Portugal, Slovakia, Slovenia, Spain | |
| Bulgaria, Croatia, Hungary, , Lithuania, Poland, Romania, Serbia, North Macedonia, Turkiye | 74 |

3.1.8.3 Youth participation events support

This cost covers the organisation of national and transnational conferences, seminars and events in presential format.

The category Multiplier events in KA2, defined in decision C(2013)8550, as amended by C(2017)6864, provides a contribution to the costs linked to national and transnational conferences, seminars, events sharing and disseminating the results of the project (excluding costs for travel and subsistence of representatives of participating organisations involved in the project). The rule of allocation assigns a contribution of 100 EUR per local participant and 200 EUR per international participant.

In Youth participation activities, the scope of project events is very similar to the Multiplier events category described above. The only substantial difference is that the events are attended by participants who may already be in the location where the activities take place and/or who are also eligible for travel and individual support insofar as they are involved in a mobility activity. Therefore, for this action, the funding mechanism for “Multiplier events” can be modified by considering all participants as local.

In light of the above, based on the amounts defined in decision C(2013)8550, as amended by C(2017)6864, the amount of contribution for Youth participation events is set at **100 EUR per participant**.

3.1.9 DiscoverEU Inclusion action

The DiscoverEU Inclusion action offers young people who are 18 years old a chance to have a short-term individual or group experience travelling across Europe by rail or other modes of transport where necessary. Participants are provided with a travel pass of seven days within one month and an individual support contributing to subsistence costs during the activity. In addition, organisations are entitled to claim inclusion support (see paragraph 3.1.3 above) for participants with fewer opportunities.

The amount of individual support is set at **78 EUR per participant per day for a maximum of 21 days**. This amount is determined as the average of the rates for youth workers mobility (Table 6 above). This choice is justified by the fact that the profile of participants and the modalities of the mobility are similar, however the activity is intended to take place across different countries and therefore a MS-specific rate would not be appropriate. The choice of the same rate as in youth workers mobility also reflects the fact that, as in that action, DiscoverEU participants have to pay for their accommodation and choose freely on the market, as opposed to youth exchanges where the organisation negotiates the price of accommodation in the same structure for all participants.

In case they need additional travel in order to reach the location where the activity starts, participants are also entitled to travel support, including “green travel” where applicable (see paragraph 3.1.1 above).

3.2 Key Action 2

In the Erasmus+ programme 2021-2027, the action “Partnerships for cooperation” represents the continuation of the “Strategic partnerships” under the 2014-2020 programme.

The main novelty for the new period is the introduction of the new action “small scale partnerships”, aimed at reaching smaller organisations and newcomers, while the action “Cooperation partnerships” presents a substantial continuity with its predecessor. In line with this principle of continuity, the funding model for Cooperation partnerships is largely based on the one of “Strategic partnerships” as defined in decision C(2013)8550 and amended by C(2017)6864.

, The adequacy of the lump sums was assessed in the Study 2023, which found that those lump sums detailed below remain relevant. Inflation over the 2022-2023 period, which might have a certain impact on the set of activities to be implemented, was not identified as a justification for modifying them.

3.2.1 Cooperation Partnerships

The determination of the amounts of contribution in the form of single lump sums was based on an analysis of project budgets financed under the Strategic partnerships action in the period 2014-2020.

As shown by the graph below, the highest concentration of projects, about 64%, was in the range between 100.000 and 300.000 EUR¹⁶, while project budgets comprised between 300.000 and 450.000 EUR represented about 16% of the total¹⁷.

The 20% of projects with a budget below 100.000 EUR will be covered by the action Small Scale partnerships, described above, with a funding mechanism based on two single lump sums with pre-defined amounts of 30.000 and 60.000 EUR. The two actions, small-scale and cooperation partnerships, should in fact be considered as complementary, as they aim at supporting similar activities but with different levels of complexity, number of partners and involved and expected results.

¹⁶ Awarded grant amounts

¹⁷ Source: Erasmus+ Dashboard. The analysis did not take into account school exchange partnerships, which had a stronger focus on mobility compared to the other KA2 actions, and therefore has more significant differences with the 2021-2027 cooperation partnerships.

Figure 1- Distribution of KA2 2014-2020 project budgets

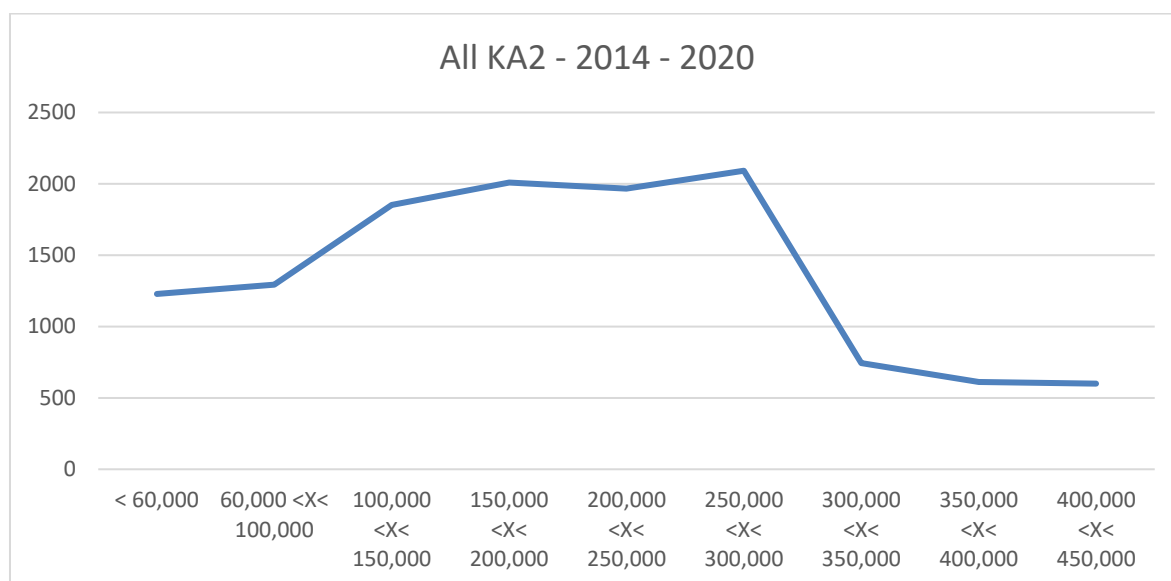


Table 8: Distribution of KA2 2014-2020 project budgets

| | SE | VET | HE | AE | YOUTH | TOT | % |
|---------------------|-----|-----|-----|-----|-------|--------------|-----|
| < 60,000 | 129 | 139 | 2 | 327 | 632 | 1,229 | 10% |
| 60,000 <X< 100,000 | 311 | 233 | 16 | 324 | 409 | 1,293 | 10% |
| 100,000 <X< 150,000 | 530 | 369 | 70 | 464 | 419 | 1,852 | 15% |
| 150,000 <X< 200,000 | 499 | 512 | 190 | 517 | 291 | 2,009 | 16% |
| 200,000 <X< 250,000 | 473 | 549 | 279 | 486 | 179 | 1,966 | 16% |
| 250,000 <X< 300,000 | 430 | 700 | 383 | 473 | 106 | 2,092 | 17% |
| 300,000 <X< 350,000 | 166 | 234 | 218 | 107 | 20 | 745 | 6% |
| 350,000 <X< 400,000 | 142 | 170 | 207 | 86 | 6 | 611 | 5% |
| 400,000 <X< 450,000 | 134 | 159 | 238 | 64 | 5 | 600 | 5% |
| | | | | | | 2,397 | |

Based on the experience from the previous programming period, it is considered that three predefined amounts of 120.000, 250.000 and 400.000 EUR will constitute an adequate and representative menu of funding levels. Combined with the small scale partnerships, this will offer applicants a clear and simple set of choices for their projects, allowing them to apply for a level of grant which is in line with the scale of their proposed activities. Given the diverse nature of all the fields covered in the programme, reaching from Education to Training to Youth and Sport, the needs and type of activities will differ. It is therefore left to the applicants to describe the planned activities adequate for their respective objectives and within the funding level chosen. Therefore, the expected outputs corresponding to the amounts are not predefined: on the contrary, a high degree of flexibility is left to applicants to define their targets in line with the programme objectives and build their project around the requested budget.

Based on the table above, the single lump sum of 120.000 EUR targets the type and scope of projects which obtained between 100.000 and 150.000 EUR in the previous programme; the lump sum of 250.000 EUR will target the main bulk of projects which obtained between 150.000 and 300.000 EUR, while the projects requiring a higher level of funding will be targeted by the 400.000 EUR lump sum. Projects which received a grant between 350.000 and 450.000 EUR in the previous programming period represented 10% of the total number and

15% of the budget. Apart from its statistical representativeness, offering this amount also constitutes a strategic policy choice, allowing to finance the most innovative and ambitious partnerships.

As the list of eligible activities and the award criteria for the action are the same for all the three fixed amounts, applicants will choose the desired level of funding based on the level of complexity and ambition of their proposal, taking into account elements such as the number of partners, the duration of the project and the number and type of proposed activities.

In particular, applicants are required to provide evidence for the elements of value for money in their application, showing that the amount requested is adequate to the content and objectives of their proposed activities. Such elements are then assessed by experts in the evaluation phase and influence the position of each proposal in the ranking list, so that proposals which are found to offer poor value for money will have a lower score and fewer chances to be selected for funding. It is therefore expected that projects will rather target a high level of activities with high European added value in order to be successfully selected within their chosen group.

The experts involved in the evaluation of proposals will also be supported by specific guidelines, providing a common methodology to use the information from projects financed in 2014-2020 as a reference for the evaluation of new proposals.

A quality assessment will also be carried out ex-post, based on the information presented in the final reports, with a view to determine the level of achievement of the project objectives stated in the application forms. Insufficient quality, corresponding to a low score in the final assessment, will constitute the basis for the application of grant reductions for poor or partial implementation.

3.2.2 Small Scale Partnerships

i. Determination of the amounts of Union contribution

The funding mechanism for this action will be based on single lump sums of predefined amounts.

In the programming period 2014-2020, the action “Strategic partnerships” funded over 3 550 projects with grant amounts lower than 100 000 EUR, for a total value of 220 million EUR, out of a total of 12 500 projects (28%) and a total budget of 2.1 billion eur (10%).

Within this portion of the projects population, about 2 700 had grant amounts comprised between 50 000 and 100 000 EUR (21% of the total). Their average value was 76 000 EUR, with a duration of 22 months and 4 partners involved. Based on the funding rules applicable in the previous programming period, the typical budget structure was the following:

| Category | Amounts | |
|---------------------------------------|---------------|---------------|
| Project management and implementation | 1 Coordinator | 11 000 |
| | 3 Partners | 16 500 |
| | Total | 27 500 |
| Project meetings | 10 600 | |

| | |
|----------------------|--------|
| Intellectual outputs | 32 700 |
| Multiplier events | 5 200 |

As the figures show, more than a third of the average grant amount was already determined in the form of a lump sum on the basis of the number of partners and project duration (Project management and implementation), while the remaining part, determined on the basis of unit contributions, was used for project meetings, events and intellectual outputs (staff costs).

In the same period, the number of grants with amounts lower than 50 000 EUR was about 850, with an average value of 35 000 EUR, a duration of 16 months and 3 partners.

The first group of grants, with amounts comprised between 50 and 100 thousand EUR, already represented a relevant portion of the population in the Erasmus+ 2014-2020 programme, while the second group with amounts below 50 000 EUR, could be considered as marginal. However, in the Erasmus+ 2021-2027 programme, the objective of the new action “Small scale partnerships” is to increase the involvement of smaller organisations and newcomers to the programme, which translates into a higher number of grants of small amounts. This motivates the choice to propose a standard amount below 50 000 EUR to attract this specific group of beneficiaries.

Based on the analysis above, the average values which would allow to cover the typical costs of projects under the 2014-2020 funding rules are 35 000 and 75 000 EUR. However, in order to stimulate participants to achieve efficiencies and seek the best value for money in their projects, the predefined amounts for the lump sum contributions will be respectively 15% and 20% lower than the average value calculated above. The predefined amounts are therefore the following:

- a) 30 000 EUR
- b) 60 000 EUR.

Applicants will select the requested amount between the two options above, based on the proposed level of complexity, ambition and duration of their project.

The minimum requirements for both budgets are the presence of two partners and the definition of a plan of eligible activities. The completion of the project activities constitutes the condition for the payment of the lump sum contribution.

The adequacy of the selected amount to the proposed project activities and their value for money will be a central element of the quality assessment in the evaluation of proposals at selection stage. Only proposals obtaining a sufficient score in these aspects will be selected for funding.

3.3 Support and network functions of the National Agencies

Apart from their role in the implementation of the programme under a contribution agreement, some National Agencies receive specific Union contributions for the following support and networking functions:

- National VET Team:
- Eurodesk: European youth information network providing information on learning mobility for young people.
- SALTO (Support, Advanced Learning and Training Opportunities): network of resource centres organising trainings for organisations and agencies involved in the Erasmus+ and European Solidarity Corps programmes.

The EU contribution to these activities implemented by National Agencies will take the form of a single lump sum.

The amount of the single lump sum will be determined for each contribution based on the estimated budget of the action proposed by the Agency. The Commission will fix the lump sum of each contribution based on the proposal, evaluation result, funding rates and the maximum contribution amount set in the work programme.

Based on these principles the following steps will be taken to calculate the amount of the lump sum contribution:

3.3.1 EU contribution proposal

National Agencies will provide an estimated budget for the work to be carried out under the action (using the submission form template). The budget can be split into work packages and eligible cost categories.

- a) The National Agencies must provide their proposals in form of activity plans, with a breakdown of the lump sum showing the share per work package (where applicable);
- b) The proposal must describe the activities covered by each work package;
- c) Proposals for lump sum contributions must contain the resources and a detailed cost estimate per work package;
- d) The co-financing rate will be applied to the total estimated eligible costs, using the funding rate approved in the work programme.

3.3.2 Evaluation

a) Proposals will be evaluated according to the standard evaluation procedures with the help of internal and/or external experts. The experts will assess the quality of the proposals, against the requirements defined in the work programme and the expected impact, quality and efficiency of the action.

b) For each work package, the estimated budget will be assessed for accuracy and if the appropriateness of the resources proposed and the split of lump sum shares allows achieving the activities and expected outputs, to be achieved in the light of the proposed resources.

To ensure equal treatment and benchmark the estimated activities and costs, the experts will consult statistical, historical or any other appropriate data on costs and resources from previously comparable funded projects, and will check that the correct indirect cost and co-financing rate have been correctly applied.

- c) They will propose to remove some ineligible costs and/or actions from the proposal, as e.g. cost of activities outside the eligibility period, costs not permitted in the action.
- d) They will check that the costs proposed are in line with the National Agency's work programme specifications, the appropriateness of the split of the work packages and the quality of the outputs

3.3.3 Determination of the lump sum amount

a) Following the activity plan evaluation, the authorising officer will establish the amount of the lump sum, taking into account the findings of the assessment carried. If cost or activities items are adapted, the lump sum and the lump sum breakdown are modified accordingly.

- b) The final lump sum is included in the contribution agreement as the maximum contribution amount. It is calculated by the Commission by applying the co-financing rate set out in the work programme specifications to the total estimated eligible costs in the budget table.
- c) The maximum amount established for the country allocations in the Commission's Annual work programme will be respected.

4 Sound financial management, co-financing principle and absence of double financing

All methodologies described above and the previous Commission authorising decisions C(2013)8550 and C(2017)6864 comply with the principles of sound financial management, co-financing and absence of double financing as required by the Financial Regulation.

4.1 Reasonable compliance with the principle of co-financing

The amounts set out in this decision are unit and lump sum contributions, meaning that the principle of co-financing has been taken into account in setting the amounts. A maximum rate of co-financing is foreseen for all the actions of the Programme. Notwithstanding the principle of co-financing, the maximum funding rate can be up to 100%, as the beneficiaries will bear additional costs which are not captured by the Union contribution.

The majority of the amounts set in this Decision are based on amounts authorised for the 2014-2020 period. As explained in the authorising decisions for that period, the contribution amounts have been defined so as to ensure they are below, or at least close to, the actual cost of the actions. For example, for the cost category "individual support", the "Study on the inclusiveness and adequacy of support for student mobility in higher education under the next Erasmus+ Programme", calculated that Union contribution covered between 34% and 42% of the overall mobility costs incurred by students. As part of the 2013 assessment for defining the methodology and levels of contribution, the proposed amounts were compared to past grants awarded as well as to the real costs reported. This analysis indicated that amounts are close to the real grants previously awarded on a global basis. Moreover, an analysis of the typical budget structure of similar projects in the past showed that the costs represented by the unit contribution is normally the largest element (average 75% of total eligible costs) of the eligible cost and that other (ineligible) costs are systematically necessary for achieving the objective of the action. This ensures that even if the unit contribution represents 100% of the eligible costs it covers, the presence of other costs ensure that, overall, the co-financing principle is respected.

Simulations were carried out for each contribution individually, but also by country and by sector (where several sectors are concerned by the same unit cost), to ensure that structural or significant isolated deviations from the historical levels of grant are limited when balanced with the overall goal of a simplicity and attractiveness for beneficiaries, thus ensuring the co-financing principle is respected on an overall basis.

Furthermore, a cap is set for contributions to costs of actions such as Jean Monnet Projects or Key Action 2 Cooperation partnerships to add further assurance to ensuring co-financing on an overall basis, but not necessarily in all projects. The cap has been set with reference to simulated budgets compared to past budgets at a lower level than the simulated total costs. Indeed, the simulations indicate that the average amount of the Union contribution under all grant items achieves the relevant Union co-financing rate as defined in the work programme, thus ensuring the respect of the co-financing principle on an overall basis. The overall co-financing rate of overall grants by action is lower than the individual ones because it takes account of eligible

costs which do not receive a contribution (e.g. under the project results support a contribution to staff cost shall be made, but the eligible communication costs shall not be taken into account).

Moreover, it can be verified during assessment stage that for any individual grant there are additional resources necessary for the implementation of the action above that provided by the EU contribution. Detailed guidelines and additional training in this respect shall be provided to the national agencies.

4.2 Sound Financial Management

Sound financial management is ensured because the methodology used to calculate the amounts set out in the decision ensure they are a proxy of the real costs. Moreover, simulations have shown that the proposed methodologies result in amounts that are on average comparable to but below the current real costs and/or real grants given (taking account of at most the maximum level of co-funding), which ensures that the grants remain attractive while respecting sound financial management.

In some cases there will be complementary sources of financing to that of the Union (e.g. some individual mobility actions). When the Union contribution is set within a range (e.g. Individual support), the overall external sources of financing are one of the factors which shall be specifically taken into account when setting the contribution amount within the defined range specified by the Commission. For example, in sending countries where little or no external co-funding is available, the agencies can apply higher ranges than in countries with greater external co-financing sources. In addition, the nature of the actions as detailed in the Work Programme excludes the possibility of generating revenues through the action.

By nature, simplified forms of grant are a proxy of the underlying costs and not an exact reimbursement of real costs. While great efforts have been invested to minimise negative impacts on any country associated to the programme¹⁸, it cannot be avoided that the new approach for 2021 - 2027 might result in different consequences for different countries. As required by the Financial Regulation the impact of the new amounts shall be closely monitored in order to be able to address any undesirable side effects. Intermediate reviews and check-up/control mechanisms are foreseen in order to ensure that the approved methodology is up to date throughout the whole programme period.

Lump sums for small-scale partnerships in KA2

In the case of small-scale partnerships under KA2, lump sum contribution amounts have been set using data from projects implemented in the 2014-2020 period, which themselves were funded using simplified forms of contributions. The amounts can therefore be expected to represent a proxy of the real costs. However, to ensure sound financial management, a further reduction of 15% was applied to the amounts.

4.3 Reasonable compliance with the principle of no double funding

There is no overlap between eligible costs. Unit costs refer to specific individual eligible costs in many cases (e.g. travel, staff costs). Where this is not the case, the funding model ensures that double funding is avoided by requiring additional outputs.

In the present Programme, double funding is prevented already effectively by preventive controls at selection stage, by national and executive agencies and the Commission. The Programme draws clear division lines between actions which reduces the risk that similar activities can be undertaken under different actions by the same participants. Furthermore, double funding is avoided by identifying all categories of eligible and ineligible costs related to the supported activities.

In this respect, as from 2014 applicant organisations have been registered and controlled in order to achieve unique identification and assist monitoring. Use of this unique identity facilitates checking of multiple applications and reduce the potential for double funding. Other tools are also available for national agencies to cross check the content of applications to avoid that the same action is funded twice.

Control of participants in learning mobility will also be possible via the Beneficiary module application that contains details of all mobility participants in mobility projects of the Erasmus+ Programme.

Annex II – centralised actions – direct management

1 Forms of Union contribution and categories of costs covered

1.1 The Union contribution shall exclusively take the form of lump sum contributions for the following actions under the Erasmus + programme

1.1.1 Education and training

- a) Key action 1: Learning Mobility
 - Erasmus+ Virtual Exchanges
- b) Key action 2: Cooperation among organisations and institutions
 - Partnership for Excellence: Erasmus Mundus Joint Master Design Measures
 - Partnerships for Innovation: Alliances
 - Partnerships for Innovation - Forward Looking Partnerships
 - Partnership for Excellence - Centres of Vocational Excellence
 - Partnership for Excellence – Erasmus+ Teacher Academies
 - Partnerships for cooperation in the field of Education and Training: European NGOs
 - European Universities
 - EPAL - Electronic Platform for Adult Learning in Europe
 - eTwinning - National Support Organisations
 - Capacity Building in the field of VET
 - Capacity Building in the field of Higher Education
- c) Key action 3: Support to policy development and cooperation
 - European Higher Education Area (EHEA) – Initiative to support to the implementation of the reforms
 - Implementing renewed priorities for the European Agenda for Adult Learning
 - The International Association for the Evaluation of Educational Achievement (IEA) - International Civic and Citizenship Education survey (ICCS)
 - The International Computer and Information Literacy Study (ICILS)
 - EUROSTUDENT VIII - Social dimension of European Higher
 - Eurydice: Network of National units
 - Support to the European Quality Assurance in Vocational Education and Training National Reference Points EQA(VET)-NRP
 - Support for further implementation of the graduate tracking initiative
 - National Academic Recognition Centres (NARIC)
 - Support to better knowledge in youth policy
 - TALIS - Teaching and Learning International Survey
 - PIAAC - Programme for the International Assessment of Adult Competencies
 - Policy Networks (EQF, EUROPASS, EUROGUIDANCE)
 - National Erasmus Offices (NEOs)
 - Social Inclusion and Common Values
 - European policy network on teachers and school leaders
 - European policy network in the field of education of children and young people with a migrant background
 - European policy experimentations

- Civil Society Cooperation in the field of Education and Training
- d) Jean Monnet actions
 - Jean Monnet Actions in the field of Higher Education: Chairs, Modules and Centres of Excellence
 - Jean Monnet Policy Debate: Networks in the field of Higher Education and in other fields of education and training
 - Jean Monnet in other fields of education and training: Teachers Training and Learning EU Initiatives

1.1.2 Youth

- a) Key action 2: Cooperation among organisations and institutions
 - Capacity building in the field of youth
 - Partnerships for Cooperation in the field of Youth : European NGOs
- b) Key action 3: Support to policy development and cooperation
 - European Youth Together (Large and Small scale)
 - EU Youth Dialogue: support to National Working Groups
 - Civil society cooperation in the field of Youth

1.1.3 Sport

- a) Key action 2: Cooperation among organisations and institutions
 - Not-for-profit European sport events
 - Small scale partnerships
 - Cooperation partnerships
 - Capacity Building in the field of Sport
- b) Key action 3: Support to policy development and cooperation
 - Dialogue with stakeholders - National Activities

The categories of eligible costs covered by the lump sum contribution are the following:

- a) Personnel costs,
- b) Travel and subsistence
- c) Subcontracting cost,
- d) Purchase costs,
- e) Other cost categories,
- f) Financing support to third parties
- g) Indirect cost

The amounts of the lump sum contributions to be used shall be calculated in accordance with point 3.

1.2 The Union contribution shall exclusively take the form of unit contributions for the following actions under the Erasmus+ Education and Training - Key action 2

- Partnerships for Excellence: Erasmus Mundus Joint Masters, including Erasmus Mundus Joint Masters – Additional scholarships for targeted regions of the world

The categories of eligible costs covered by the unit contributions are the following:

- a) Student scholarships to individuals covering travel and installation costs and subsistence costs,

- b) Institutional costs covering staff costs (teaching), staff travel costs, invited guest lecturers, promotion, dissemination, organisational costs (including insurance for the students, financial support to students special needs , assistance with accommodation, and other student services), administrative costs, and all other costs necessary to implement a successful master programme,
- c) Cost for special needs for the enrolled students

The amounts of the unit contribution to be used shall be calculated in accordance with point 3.

2 Justification

The use of lump sum and unit contribution will reduce the administrative burden and reduce the scope for error in the cost claims, will speed up the payment process and will ensure an effective risk control, while focusing on the quality of the results

The high number of actions and applications together with average amount of the grants justify the use of simplified cost options.

This system will facilitate a wider access to the grants as the rules for participation, implementation and reporting, are simpler and easier of understand for beneficiaries than the classical budget based mechanism. It provides legal certainty to the beneficiaries and ensures a better quality of the applications.

The diversity of actions and beneficiaries (profit making companies, public bodies, cultural associations, universities, designated bodies...) within this programme, makes the use of lump sum appropriate to facilitate the correct and complete implementation of the action.

The outputs of individual co-financed projects are tangible, qualifiable, and quantifiable (they include scholarships, trainings, traineeship for students, mobilities, lectures, events...).

Finally, the use of lump sum and unit contributions can reduce the administrative costs for participation in the programme and contribute to the prevention and reduction of financial errors (i.e staff cost calculations...). It also simplifies the calculation of grant amounts, while decreasing significantly the workload of both the beneficiaries and the granting authority (i.e complexity of verification of real costs through underlying supporting documents...). As a consequence, the payment procedures are accelerated

2.1 Nature of the supported actions

Erasmus+ is the EU Programme in the fields of education, training, youth and sport for the period 2021-2027. Education, training, youth and sport are key areas that support citizens in their personal and professional development. High quality, inclusive education and training, as well as informal and non-formal learning, ultimately equip young people and participant of all ages with the qualifications and skills needed for their meaningful participation in democratic society, intercultural understanding and successful transition in the labour market.

The Erasmus+ programme is subdivided in 3 key actions and Jean Monnet actions under Education and Training, Youth and Sport.

This Annex II part of the decision applies to centralised actions managed by the Agency

2.1.1 Key Action 2: Cooperation among organisations and institutions

The actions supported will bring positive and long-lasting effects on the participating organisations, on the policy systems in which such Actions are framed as well as on the organisations and persons directly or indirectly involved in the organised activities.

This Key Action is expected to result in the development, transfer and/or implementation of innovative practices at organisational, local, regional, national or European levels.

- strengthened cooperation between organisations and institutions active in the fields of education, training, youth and sport;
- development of innovative and inclusive approaches in addressing and reaching out to target groups of education, training, youth and sport policies;
- increased participation of individuals with fewer opportunities in education, training, youth and sport activities.
- increased digital capacity and readiness of organisations and institutions; a more strategic and integrated use of digital technologies and support for support digital transformation plans, open educational resources and open practices in education, training, youth and sport;
- more modern, dynamic, committed and professional environments inside the participating organisations: ready to integrate good practices and new methods into daily activities; open to synergies with organisations active in different fields or in other socio-economic sectors; strategic planning of professional development for staff in line with individual needs and organisational objectives;
- increased capacity of organisations and institutions to work and cooperate at EU/international level.
- improved sharing of good practices among organisations and institutions.

2.1.2 Key Action 3: Support for Policy Reform

Provides support to policy cooperation at European Union level, thereby contributing to the development of new policies, which can trigger modernisation and reforms, at European Union, and systems' level, in the fields of education, training youth and sport.

The actions implemented through Key Action 3 are intended to produce the main following results:

- improved quality, equity and inclusiveness education and training systems as well as youth and sport policies;
- higher degree of transnational cooperation and mutual learning between competent authorities and policy makers in the fields of education, training, youth and sport;
- increased knowledge and analytical capacity to support evidence-based policies in the fields of education, training, youth and sport;
- availability of sound comparative international data and appropriate secondary analyses for European and national policy making;
- improved tools for assessment, transparency and recognition of skills and qualifications acquired through formal, non-formal and informal learning;
- good functioning of European networks in charge of guidance and implementing tools that foster the transparency and recognition of skills and qualifications acquired through formal, non-formal and informal learning;
- active involvement of civil society networks and non-governmental organisations in policy implementation;

- increased participation of young people and youth stakeholders in the EU Youth Dialogue;
- increased levels of participation of individuals in sport and physical activity
- higher degree of exchanges of good practices, dialogue, mutual learning and cooperation among policy makers, practitioners and stakeholders from Programme and Partner Countries;
- increased public awareness about European policies in the fields of education, training, youth and sport as well as increased awareness about the results of the Erasmus+ Programme;
- greater synergies with other EU Programmes, such as the European Structural and Investment Funds, as well as with funding schemes at national or regional level.

2.1.3 Jean Monnet

- a) Jean Monnet actions in the field of higher education enable higher education institutions inside and outside the EU to promote teaching and research on European integration and promote policy debate and exchanges involving the academic world and policy-makers on Union policy priorities. The following actions are supported:
 - Jean Monnet Modules: short teaching programmes in one or more disciplines of European Union studies;
 - Jean Monnet Chairs: longer teaching posts with a specialization in European Union studies for individual university professors, including Honorary Jean Monnet Chairs (without grant);
 - Jean Monnet Centres of Excellence: focal points gathering knowledge of high-level experts in various disciplines of European studies, as well as developing transnational activities and structural links with academic institutions in other countries;
- b) Jean Monnet actions in other fields of education and training supports learning about the objectives and the functioning of the European Union and promotes active citizenship and the common values of freedom, tolerance and non-discrimination institutions in other fields of education. The following actions are supported:
 - Jean Monnet Teacher Training: enables teachers in schools to develop new skills and to teach and engage on EU matters, thus empowering them through a better understanding of the EU and its functioning. It will offer opportunities to education providers to develop content (teaching and training modules, materials for teachers and trainers, etc.) and innovative tools as well as to carry out activities within education and training institutions, to raise awareness and exchange views about the European Union matters and subject studies;
 - Jean Monnet Learning EU Initiatives: addresses schools and VET institutions the current widespread lack of knowledge of the EU, its basic functioning and objectives by promoting critical awareness of the EU. They will help young Europeans become active and informed citizens, engaged in the democratic processes that shape their future and that of the EU. The Learning EU initiatives will enable teachers in schools and VET institutions to develop activities bringing facts and knowledge on the European Union to a broad spectrum of learners, also reaching out to their community (parents and families, local actors and authorities).
- c) Jean Monnet policy debate

- Jean Monnet networks in Higher Education: have as primary objective to collect, share and discuss among the partners research findings, content of courses and experiences, products (studies, articles, etc.).
- Jean Monnet networks in other fields of education: promotes an international aspect to school education and exchange of good practices and co-teaching within a group of countries. It will promote a common understanding on learning methodologies relevant to EU issues among practitioners working under different constraints such as differing national legislations and curricula structures.

2.2 Risks of irregularities and fraud and costs of control

The use of lump sum and unit contributions is essential for the actions where activities and outputs are evaluated and approved by an ex-ante evaluation, based in objective and reliable information (historical, statistical data...).

The risk of errors or irregularities is lower than when using real costs because there is no reporting of actual costs. Moreover, beneficiaries have no obligation to provide documents to the granting authority on the costs incurred. Notwithstanding this, they remain subject to applicable accounting rules and the specific eligibility rules of the programme.

The lump sum and unit contributions are output-based, meaning the main condition for payment is achievement of the pre-defined outputs. In terms of control, the granting authority will undertake checks at the time of preparation of the grant, during the implementation of the action and at the completion of the actions (through reports from funded projects, checks on milestones and deliverables, reviews and/or audits).

The risk of fraud and the cost of controls of the triggering event, for the lump sum or unit cost payment, are limited, since the proper implementation of the action is clearly defined and output-based. If the conditions for payment of the lump sum or unit cost have not been met, (e.g. a particular work package has not been completed or not as defined), or if the action that entitles the unit cost has not been carried out (e.g. not travel made, not scholarship implemented) and an undue payment was made to a beneficiary, those costs will become ineligible and the granting authority will be entitled to reduce the grant and consequently recover the undue paid amounts. All of this can be verified in the context of the granting authority's control and anti-fraud strategy, (AFS)¹⁹ that together with a long experience of controlling simplified cost options will ensure a reasonable level of assurance,.

3 Method to determine the amount of the Union contribution in the form of lump sum contributions

3.1 Method to determine the amount of the Union contribution in the form of lump sums contributions for the following actions:

- Not-for-profit European sport events,
- Dialogue with stakeholders - National Activities,
- Jean Monnet Modules and Chairs,
- Jean Monnet Learning EU Initiative,
- Erasmus Mundus Joint Master Design Measures,

¹⁹ The EACEA Anti-Fraud Strategy (AFS) and its related action plan 2018-2020 were adopted on 9 July 2018 by the Steering Committee and approved by the college on 29 April 2019

- Sport - Small scale partnerships,
- Sport - Cooperation partnerships,
- European NGOs Partnerships for cooperation in the field of Education and Training and in the field of Youth
- Civil Society Cooperation in the field Education and Training and in the field of Youth

3.1.1 Not-for-profit European sport events

3.1.1.1 Nature of the supported actions

This action will support the preparation, organisation and follow up of not-for-profit sport events, organised either in one single country or in several countries by not-for-profit organisations or public bodies active in the field of sport.

The EU grant covers the following activities (non-exhaustive list): preparation and organisation of the event, organisation of educational activities for athletes, coaches, organisers and volunteers in the run-up to the event; organisation of side-activities to the sporting event (conferences, seminars); training of volunteers; implementation of legacy activities (evaluations, drafting of future plans); communication activities linked to the topic of the event.

3.1.1.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

Each year the Agency receives 80-100 applications under this action with a result of 11 to 18 grants agreement signed.

The calculation of the lump sum contributions is determined based on an internal expert judgement based on historical data of the total reimbursed cost of the financed projects.

A sample of 27 financed projects of 2016/2018 of the previous MMF (2014-2020), were pre-selected for this analysis.

From this 27 financed projects we took out 4 projects with an average funding of 57 000, and 3 projects above 1 000 000 EUR that would be financed during the period 2021-2027 via another funding mechanism.

Of the 20 projects (representing 70% of the total number of financed projects) covering 2 years of calls, the analysis identifies two types of events with clear different categories of costs:

- i. European local events where national events were replicated/organised in different countries (e.g. Special Olympic football) event across 21 countries.
- ii. European wide events in one programme country: one major event organised with the participation of organisations from at least 10 different countries (e.g. opening of the Women World Football cup in Copenhagen).

These two types of events have specific characteristics in terms of funding:

- i. The European wide events were awarded a Union contribution ranging between 400 000 and 500 000 EUR and while European local events were awarded a Union contribution between 200 000 and 300 000 EUR.

The correlation of the grant awarded with the number of events being higher than the one with the number of countries (0,93 vs 0,63) it was decided to use the former as parameter to generate the lump sum.

ii. For European local event actions, each event must be held in each of the Programme countries of the participating organizations. The grant requested will correspond to the amount assigned to the number of participating events/organisations .

Based on the data at hand, a distinction should also be made between events replicated in less than 6 countries, and larger scale replication (from 6 territories).

- actions involving a minimum of 3 organisations coming from 3 different Programme countries to a maximum of 5 organisations coming from 5 different Programme countries could request 200 000 EUR
- actions involving a minimum of 6 organisations coming from 6 different Programme Countries could request 300 000 EUR

Simulations of these lump sums show that it would entail a global funding reduction of ~5%. It can therefore be accepted as a reliable proxy of the actual cost.

The European wide event, are mono event with at least the participation of 10 organisations from 10 different Programme countries. The activities must take place in the Programme country of the applicant organisation involved.

The strand proposed will be set one event organised and the corresponding action will involve 10 or more countries at 450 000 EUR

The final payment will correspond to the completed work packages, with the limit established in the maximum grant amount set in the grant agreement, and, without prejudice to the application of the articles specifically related to payment conditions and grant reduction.

Simulations of this lump sum applied to actions implemented in the past show that it would entail a global funding reduction of ~4%. It can therefore be accepted as a reliable proxy of the actual cost.

| i. European local events | |
|---------------------------------|-------------|
| Number events | Funding |
| 3 to 5 | 200 000 EUR |
| >or = 6 | 300 000 EUR |

| ii. European wide events | |
|---------------------------------|-------------|
| Number countries | Funding |
| >or = 10 | 450 000 EUR |

3.1.2 Dialogue with stakeholders - National Activities

3.1.2.1 Nature of the supported actions

The European Week of Sport initiative is part of an overall policy aiming at increasing the level of participation in sport and physical activity in the EU. The main objective of the action is to help to ensure that the European Week of Sport initiative is implemented and gets visibility in the participating countries and that the messages of the Week reaches out to as many Europeans as possible and encourages them to be active. To this end, the competent ministries of each

Member State appoints each organizing entities, National Coordinating Bodies (NCB) that will perform three main tasks:

- i. Event(s) organisation: each National Coordinating Body (NCB) must organise at least one national event in their country, preferably during the European Week of Sport (23-30 Sept.);
- ii. Coordination: Ensure close links with national key players (e.g. National Olympic Committees, sport federations and confederations, education institutions and schools, etc.) who can play a role for the action before, during and after the European Week of Sport;
- iii. Communication: Ensure visibility for the European Week of Sport through national and European campaigns.

The outputs are the sport events themselves and the communication campaign(s) with the #BeActive message “let’s do sport”, as well as the network of stakeholders.

3.1.2.2 Method to determine and update the amount of the Union contribution in the form of lump sum contributions

a) Data sources and sample

This action began in 2015 and since then has been modified and adapted to the needs of the action. The level of funding has varied as more activities have been added and more needs have been met. Therefore, the data selected was obtained from the latest implemented projects; 32 grant agreements signed in 2018 for actions implemented up to 2019.

For the following analysis we have considered the EU grant awarded after the co-financing rate of 80% was applied .

b) Analysis

Most actions are concentrated between 150 000 and 200 000 EUR, with an average of 176 000 EUR.

Simulations have been carried out to verify the effect on the actual funding levels of applying a number of amounts :

- an amount of 150 000 EUR results in an overall reduction in funding of 13,5%;
- an amount of 160 000 EUR results in an overall reduction in funding 8,3%;
- an amount above 160 000 EUR, although diminishing this funding gap, results in overfunding of some smaller project by up to 14% (for 165 000 EUR) or to 18% (170 000 EUR) in some regions.

Based on this, and in order to ensure the principle of co-financing, the lump sum contribution for this action is set at 160 000 EUR.

3.1.3 Jean Monnet Modules and Chairs

3.1.3.1 Nature of the supported actions

This action has used simplified cost options since 2010 and therefore the beneficiaries are familiar with these methodologies. The new lump sums will be based on the previously used unit costs and flat rates and will further simplify the implementation of the action.

- Jean Monnet Chair - a teaching post with a specialisation in European Union studies for university professors or senior lectures. Only one professor may hold the Chair and must provide a minimum number of teaching hours per academic year.
- Jean Monnet Module - a short teaching programme (or course) in the field of European Union studies at a Higher Education Institution. Each Module has a minimum duration of teaching hours per academic year. Modules may concentrate on one particular discipline in European studies or be multidisciplinary in approach and therefore call upon the services of several professors and experts.

A significant added value of this system is the possibility to differentiate the lump sum to correspond to countries with similar teaching hour costs. This methodology will allow the granting authority to differentiate the maximum amount of the grant according to the country of each applicant and the teaching hours that they have declared in the application.

Moreover, simulations have shown that the proposed methodologies result in similar amounts to the current use of flat rates and unit costs, which ensures that the grants remain attractive while respecting sound financial management

3.1.3.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

a) Data sources

The simplified funding model for the Lifelong Learning Programme Jean Monnet was established after a study carried out by EACEA and approved for the previous MMF period 2014-2020.

For the purposes of this new methodology, historical data from Jean Monnet Chairs and Modules selected between 2014 and 2020 was extracted.

b) Sample

Data was extracted from the final activity reports of 203 projects from a population of 299 financed projects, specifically, 142 out of 227 for Jean Monnet Chair and 61 out of 72 for Jean Monnet Modules.

c) Analysis

The lump sum has been estimated using the following information :

Unit cost for teaching costs per country approved in the previous MMF²⁰, where the minimum hourly teaching cost was set at 80 EUR and the maximum at 200 EUR. The Jean Monnet Programme is open to participants and beneficiaries from all over the world.

Country teaching rate: is a flat rate for costs not associated with the preparation and delivery of teaching programme (10% for a Chair and 40% of a Module) including non-teaching staff costs (for assistants, administrative staff, etc.), travel and subsistence costs, dissemination costs, interpretation costs and other costs linked to event organisation, teaching materials, etc. This top-up enables the beneficiary to implement the action properly.

- The country teaching rate: flat rates of 10% and 40% are calculated as percentages of the national teaching costs;

²⁰ The system was introduced for these project types under the 2010 Call for proposals following the European Commission's approval of the 2010 EAC Annual Work Programme (C(2009)7734) of 7 October 2009 and C(2013)8550 of 4 December 2013

- The top-up percentage is higher for Module as more additional (accompanying) activities are organised, and, several teachers/professors are involved in the delivery of the teaching programme, whereas for a Jean Monnet Chair only one staff member is responsible for the delivery of the entire teaching programme;

In both cases, for the Module and the Chair, the top-up percentages have been set to reflect the real costs typically incurred for each type of activity over the lifetime of the programme and as such are based on actual expenditure.

The final payment will correspond to the hours finally implemented, with the limit established in the maximum grant amount set in the grant agreement and without prejudice to the application of the grant reduction articles in this regard.

In addition, using this lump sum the risk of irregularity on adding teaching hours without a maximum limit is limited.

• **Methodology for Jean Monnet Chairs**

From a population of 227 financed projects belonging to the 2014-2020 MFF, a selection of 142 projects has been made through the following steps:

- a) The following formula has been applied: Total number of teaching hours for a 3 years period* country teaching rate (110%) *75% co-financing;
- b) After a screening of these projects, the non-compliant projects with the 100% teaching rate (not 100% match between grant awarded and ex-post checked) were removed;
- c) In order to focus on countries having a specific teaching cost amount, projects from “Other countries” were taken out of the sample.

Applying these parameters, a population of 142 projects is obtained amounting to EUR 6 624 898, covering actions from Programme and Partner countries

75% of the population is within the range 270-450 hours for teaching hours over the 3 year period.

Using these results, a reference grid has been developed establishing different tranches with the ratios of teaching hours and groups of countries (see Tables 1 and 2 below). The starting point has been set to 270 hours (minimum requested hours) and it is increased by 30 hours for each tranche with a maximum amount of the grant set at 50 000 EUR. The beneficiary will request the amount corresponding to the number of hours they intend to teach over the 3 year period. If at the final payment, those hours are not delivered, the amount of the grant will be reduced to the amount corresponding to the tranche below, and without prejudice to the grant reduction articles set in the grant agreement. The maximum grant amount set in the grant agreement may not be exceeded.

The countries have been distributed into the groups based on their similar teaching costs. The application of the grid amounts ensures the best proxy to the reality of each action and country, and the rule of non-profit is ensured.

The tranches are designed covering the 100% of the analysed population.

In order to avoid the disparities in the reported working hours from the former financing scheme, where no upper limit on teaching hours was fixed, this lump sum scheme will set an equitable distribution system between the different countries, where everyone has the opportunity to reach the maximum lump sum contribution of 50 000 EUR.

Financial result of the simulation with this method: new budget within error margin (<1%): 6.597.00 vs 6.624.898 EUR.

Initial amounts resulting from this calculation were further updated with the inflation rate over the period January 2021-May 2023. Calculation was based on the HICP EU 27 countries which was equal to 126,35 in April 2023 and 106,27 in January 2021, thus producing an average rate equal to 18,89% While this index applies to the EU Member States, recognising that specific economic conditions may vary across regions, the same increase has been applied with respect to partner countries. In this direction, taking into account that the countries remain distributed according to their similar teaching costs, this approach preserves continuity and maintains a consistent framework for all participating entities.

- **Methodology for Jean Monnet Modules**

From a population of 72 financed projects belonging to the 2014-2020 MFF, a selection of 61 projects has been made through the following steps:

- a) The following formula has been applied: Total number of teaching hours for a 3 years period* country teaching rate* (140%) *75% co-financing;
- b) After a screening of these projects, the non-compliant projects with the 100% teaching rate (not 100% match between grant awarded and ex-post checked) were removed.

Applying these parameters gives a population of 61 projects amounting to EUR 1 544 867, covering actions from Programme and Partner countries.

75% of the population is within the range 120-240 hours for the teaching hours over a 3 year period.

Following this, a reference grid has been developed establishing different tranches with the ratios of teaching hours and groups of countries (see Tables 3 and 4 below). The starting point has been set to 120 hours (minimum numero of hours required) and it is increased by 30 hours for each tranche with a maximum amount of the grant set at 30 000 EUR. The beneficiary will request the amount corresponding to the number of hours they intend to teach over the 3 year period. If at the final payment, those hours are not delivered, the maximum amount of the grant will be reduced to the amount corresponding to the tranche below and without prejudice to the grant reduction articles set in the grant agreement. The maximum grant amount set in the grant agreement may not be exceeded.

The countries have been distributed into the groups based on their similar teaching costs. The application of the grid amounts ensures the best proxy to the reality of each action and country and the rule of non-profit is ensured.

The tranches are designed to cover the 100% of the analysed population.

In order to avoid the disparities in the reported working hours from the former financing scheme, where no upper limit on teaching hours was fixed, this lump sum scheme will set an equitable distribution system between the different countries, where everyone has the opportunity to reach the maximum lump sum contribution of 30 000 EUR

Financial result of the simulation with this method: new budget within error margin <1%: 1 547 000EUR (vs 1 544 867 EUR).

Similar to Jean Monnet Chairs, initial results following this method were further updated with the inflation rate over the period January 2021-May 2023.

Table 1: Lump sum for Jean Monnet Chair for Programme countries

| | Teaching hours over the 3 years period (min 90/year) | | | | | | | | | | | | | | | | |
|-----------------------------|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------|
| Country | 270-300 | 301-330 | 331-360 | 361-390 | 391-420 | 421-450 | 451-480 | 481-510 | 511-540 | 541-570 | 571-600 | 601-630 | 631-660 | 661-690 | 691-720 | 721-750 | >750 |
| Bulgaria | | | | | | | | | | | | | | | | | |
| Liechtenstein | | | | | | | | | | | | | | | | | |
| Republic of North Macedonia | 21,500 | 24,000 | 26,000 | 28,000 | 30,000 | 32,500 | 35,000 | 37,500 | 40,000 | 42,500 | 45,000 | 47,500 | 50,000 | 52,500 | 55,000 | 57,500 | 60,000 |
| Romania | | | | | | | | | | | | | | | | | |
| Serbia | | | | | | | | | | | | | | | | | |
| Croatia | | | | | | | | | | | | | | | | | |
| Latvia | 22,500 | 25,000 | 27,000 | 29,000 | 31,000 | 33,500 | 36,000 | 38,500 | 41,000 | 43,500 | 46,000 | 48,500 | 51,000 | 53,500 | 56,000 | 58,000 | 60,000 |
| Turkiye | | | | | | | | | | | | | | | | | |
| Czechia | | | | | | | | | | | | | | | | | |
| Estonia | | | | | | | | | | | | | | | | | |
| Hungary | | | | | | | | | | | | | | | | | |
| Lithuania | 30,000 | 33,500 | 37,000 | 40,500 | 44,000 | 47,500 | 51,000 | 54,500 | 58,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| Poland | | | | | | | | | | | | | | | | | |
| Slovakia | | | | | | | | | | | | | | | | | |
| Greece | | | | | | | | | | | | | | | | | |
| Malta | | | | | | | | | | | | | | | | | |
| Portugal | 37,000 | 40,500 | 44,000 | 47,500 | 51,000 | 54,500 | 58,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| Slovenia | | | | | | | | | | | | | | | | | |
| Cyprus | | | | | | | | | | | | | | | | | |
| Iceland | 44,000 | 48,500 | 53,000 | 57,500 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |

| | | | | | | | | | | | | | | | | | |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Italy | | | | | | | | | | | | | | | | | |
| Spain | | | | | | | | | | | | | | | | | |
| Finland | | | | | | | | | | | | | | | | | |
| France | 51,000 | 55,000 | 59,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| Ireland | | | | | | | | | | | | | | | | | |
| Austria | | | | | | | | | | | | | | | | | |
| Belgium | | | | | | | | | | | | | | | | | |
| Denmark | | | | | | | | | | | | | | | | | |
| Germany | | | | | | | | | | | | | | | | | |
| Luxembourg | 55,500 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| Netherlands | | | | | | | | | | | | | | | | | |
| Norway | | | | | | | | | | | | | | | | | |
| Sweden | | | | | | | | | | | | | | | | | |

Table 2 Lump sum for Jean Monnet Chair for Partner Countries

| | Teaching hours over the 3 years period (min 90/year) | | | | | | | | | | | | | | | | |
|-----------------------|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------|
| Country | 270-300 | 301-330 | 331-360 | 361-390 | 391-420 | 421-450 | 451-480 | 481-510 | 511-540 | 541-570 | 571-600 | 601-630 | 631-660 | 661-690 | 691-720 | 721-750 | >750 |
| Antigua and Barbuda | | | | | | | | | | | | | | | | | |
| Barbados | | | | | | | | | | | | | | | | | |
| Chile | | | | | | | | | | | | | | | | | |
| Libya | | | | | | | | | | | | | | | | | |
| Mexico | 25,000 | 27,500 | 30,000 | 32,500 | 35,000 | 37,000 | 39,000 | 41,000 | 43,500 | 46,000 | 48,500 | 51,000 | 53,500 | 56,000 | 58,000 | 60,000 | 60,000 |
| Saint Kitts and Nevis | | | | | | | | | | | | | | | | | |
| OTHER COUNTRIES | | | | | | | | | | | | | | | | | |
| Bahrain | | | | | | | | | | | | | | | | | |
| Russian Federation | 29,000 | 32,500 | 36,000 | 39,500 | 41,000 | 46,500 | 50,000 | 53,500 | 57,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| Trinidad and Tobago | | | | | | | | | | | | | | | | | |
| Equatorial Guinea | | | | | | | | | | | | | | | | | |
| Israel | | | | | | | | | | | | | | | | | |
| Oman | 37,000 | 40,500 | 44,000 | 47,500 | 51,000 | 54,500 | 58,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| Saudi Arabia | | | | | | | | | | | | | | | | | |
| Seychelles | | | | | | | | | | | | | | | | | |
| Korea, Republic of | | | | | | | | | | | | | | | | | |

| | | | | | | | | | | | | | | | | | |
|--------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| New- Zealand | 44,000 | 48,500 | 53,000 | 57,500 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| Japan | | | | | | | | | | | | | | | | | |
| United Kingdom | 51,000 | 55,000 | 59,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| Australia | | | | | | | | | | | | | | | | | |
| Brunei | | | | | | | | | | | | | | | | | |
| Canada | | | | | | | | | | | | | | | | | |
| Hong Kong | | | | | | | | | | | | | | | | | |
| Kuwait | | | | | | | | | | | | | | | | | |
| Qatar | | | | | | | | | | | | | | | | | |
| Singapore | 55,500 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| Switzerland | | | | | | | | | | | | | | | | | |
| United Arab Emirates | | | | | | | | | | | | | | | | | |
| United States of America | | | | | | | | | | | | | | | | | |

Table 3 Lump sum for Jean Monnet Modules for Programme countries

| Teaching hours over the 3 years period (min 90/year) | | | | | | | | | |
|--|---------|---------|---------|---------|---------|---------|---------|---------|--------|
| Country | 120-150 | 151-180 | 181-210 | 211-240 | 241-270 | 271-300 | 301-330 | 331-360 | >360 |
| Bulgaria | | | | | | | | | |
| Liechtenstein | | | | | | | | | |
| Republic of North Macedonia | 13.500 | 17.000 | 19.500 | 22.500 | 25.500 | 28.500 | 31.500 | 35.000 | 35.000 |
| Romania | | | | | | | | | |
| Serbia | | | | | | | | | |
| Croatia | | | | | | | | | |
| Latvia | 16.000 | 19.500 | 23.000 | 26.500 | 30.000 | 33.000 | 35.000 | 35.000 | 35.000 |
| Turkiye | | | | | | | | | |
| Czechia | | | | | | | | | |
| Estonia | | | | | | | | | |
| Hungary | 18.000 | 22.000 | 26.000 | 30.000 | 34.000 | 35.000 | 35.000 | 35.000 | 35.000 |
| Lithuania | | | | | | | | | |
| Poland | | | | | | | | | |
| Slovakia | | | | | | | | | |
| Greece | | | | | | | | | |
| Malta | 23.000 | 27.000 | 32.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 |
| Portugal | | | | | | | | | |
| Slovenia | | | | | | | | | |
| Cyprus | | | | | | | | | |
| Iceland | 26.000 | 32.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 |
| Italy | | | | | | | | | |
| Spain | | | | | | | | | |
| Finland | 31.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 |

| | | | | | | | | | |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| France | | | | | | | | | |
| Ireland | | | | | | | | | |
| Austria | | | | | | | | | |
| Belgium | | | | | | | | | |
| Denmark | | | | | | | | | |
| Germany | 33.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 |
| Luxembourg | | | | | | | | | |
| Netherlands | | | | | | | | | |
| Norway | | | | | | | | | |
| Sweden | | | | | | | | | |

Table 4 Lump sum for Jean Monnet Modules for Partner countries

| Teaching hours over the 3 years period (min 90/year) | | | | | | | | | |
|--|---------|---------|---------|---------|---------|---------|---------|---------|--------|
| Country | 120-150 | 151-180 | 181-210 | 211-240 | 241-270 | 271-300 | 301-330 | 331-360 | >360 |
| Antigua and Barbuda | | | | | | | | | |
| Barbados | | | | | | | | | |
| Chile | | | | | | | | | |
| Libya | 13.500 | 16.500 | 19.500 | 22.500 | 25.500 | 28.500 | 31.500 | 35.000 | 35.000 |
| Mexico | | | | | | | | | |
| Saint Kitts and Nevis | | | | | | | | | |
| OTHER COUNTRIES | | | | | | | | | |
| Bahrain | | | | | | | | | |
| Russian Federation | 18.000 | 22.000 | 26.000 | 30.000 | 34.000 | 35.000 | 35.000 | 35.000 | 35.000 |
| Trinidad and Tobago | | | | | | | | | |
| Equatorial Guinea | | | | | | | | | |
| Israel | 23.000 | 27.000 | 32.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 |
| Oman | | | | | | | | | |
| Saudi Arabia | | | | | | | | | |
| Seychelles | | | | | | | | | |
| Korea, Republic of | 26.000 | 32.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 |
| New-Zealand | | | | | | | | | |
| Japan | 31.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 |
| United Kingdom | | | | | | | | | |
| Australia | 33.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 | 35.000 |

Brunei
Canada
Hong Kong
Kuwait
Qatar
Singapore
Switzerland
United Arab
Emirates
United States of
America

3.1.4 Jean Monnet Learning EU Initiatives

3.1.4.1 Nature of the action

The Jean Monnet Learning EU Initiatives is a short teaching programme (or course) in the field of European Union studies at schools or VET providers at level ISCED 1-4. Each Learning EU initiative action has a minimum duration of 40 teaching hours per school year over 3 years period. The Jean Monnet Learning EU Initiatives action concentrates on the creation of experiences with a focus on learning outcomes about the European Union and its policies for pupils in both primary or secondary schools. Schools will create the learning content and must provide a minimum number of learning hours per school year. Learning EU Initiatives cover only programme countries.

This action follows a lump sum funding model for grants. This funding scheme will allow putting the focus on the outputs rather than the inputs, thereby placing emphasis on the quality and level of achievement of measurable objectives.

A significant added value of this model is the possibility to differentiate the lump sum according to groups of countries with similar teaching hour costs. Doing so will allow the granting authority to differentiate the maximum amount of the grant according to the country of each applicant.

This action is a mirror action of Jean Monnet Modules²¹ but with different actors. Jean Monnet Modules are developed by Higher Education Institutions while Jean Monnet Learning EU initiatives is to be developed by schools and VET providers at level ISCED 1-4.

Jean Monnet Modules have been implemented with simplified cost options since 2010. For the new MFF 2021_2027, a new simplified cost – based on a lump sum approach- was developed (see 3.1.3).

The amounts of the grants for each tranche have been set according to the country of the applicants, which are grouped by similar standards of living. It ensures that the grants remain attractive while respecting sound financial management. In addition, using this lump sum the risk of irregularity on adding teaching hours without a maximum limit is limited.

3.1.4.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

Learning EU initiatives is built on the existing methodology for Jean Monnet Modules, which is developed based on two factors: a) the unit value of teaching hours per country and b) the flat rate for additional costs not associated with the preparation and delivery of teaching programs.

As a basis:

- Minimum of learning hours is set at 40 hours per year over a 3-year period, exactly like for Jean Monnet Modules;
- Five tranches of learning hours have been established over a 3-year period while for Jean Monnet Modules there are eight tranches;

²¹ Jean Monnet Module being a short teaching program (or course) in the field of European Union studies at a Higher Education Institution. Each Module has a minimum duration of teaching hours per academic year. Modules may concentrate on one particular discipline in European studies or be multidisciplinary in approach and therefore call upon the services of several professors and experts.

- The grouping of countries, having a similar living cost, is the same as for Jean Monnet Modules;
- The value of teaching hours was established based on historical data in projects showing the actual remuneration of professors within the same group of countries;
- A correction of 15 % was applied due to the difference in salaries between academic staff and teachers;
- A 40% flat rate was applied as a top-up for costs that are not associated with the preparation and delivery of teaching programs, such as non-teaching staff costs (for assistants, administrative staff, etc.), travel and subsistence costs, dissemination costs, interpretation costs and other costs linked to event organization, teaching materials, etc., - like for Jean Monnet Modules.

- Unit value of teaching hours

For Jean Monnet Modules, the unit value of teaching was built on the basis of unit cost for teaching costs per country from historical project data.

For Jean Monnet Learning EU Initiatives, a difference of 15% has been applied to reflect a salary difference between academic staff and teachers in school.

This was based on the following elements:

- ISCED 1-4 covers schools while ISCED 6-7-8 covers universities.
- There are only data for 9 European countries.
- The teachers' salaries are taken from Eurydice study « Teachers' and School Heads' Salaries and Allowances in Europe 2018/19» and, more specifically, on page 25 Figure 7: Average annual gross actual salaries (EUR) of teachers aged 25-64 in public schools, 2018/19.
- Information about remuneration of professors was taken from pages 75-76 in Eurydice study «Modernisation of Higher Education in Europe: Academic staff - 2017 ». This is based on surveys including self-reported pay.

| | ISCED 6-7-8 Professor Senior staff | ISCED 6-7-8 Professor Junior staff | ISCED 1 Teacher | ISCED 2 Teacher | ISCED 3-4 Teacher | Average |
|-------------|--|--|--------------------|--------------------|----------------------|---------------|
| Germany | 66.500 | 39.900 | 58.847 | 64.599 | 69.457 | 64.301 |
| Portugal | 66.500 | 39.900 | 29.561 | 32.291 | 31.573 | 31.142 |
| Netherlands | 66.500 | 39.900 | 51.148 | 61.996 | 61.996 | 58.380 |
| Austria | 66.500 | 39.900 | 50.764 | 58.322 | 65.347 | 58.144 |
| Italy | 47.500 | 28.500 | 29.494 | 31.631 | 33.796 | 31.640 |
| Finland | 47.500 | 28.500 | 44.408 | 49.303 | 55.731 | 49.814 |
| Norway | 47.500 | 28.500 | 56.089 | 56.089 | 60.754 | 57.644 |
| UK | 47.500 | 28.500 | 39.577 | 39.577 | 44.198 | 41.117 |
| Poland | 30.000 | 18.000 | 14.284 | 14.517 | 14.178 | 14.326 |
| | 54.000 | 32.400 | 41.575 | 45.369 | 48.559 | 45.168 |
| | | | 77% | 84% | 90% | 84% |

Based on the above analysis, the average teacher's remuneration for these countries is about 84% of the average remuneration of senior staff at university.

Staff at universities progress rapidly to higher pay scales whereas they can have about 10% income from other sources. Assuming 70% at senior staff at university times €54,000 and 30% at junior staff level at university times €32,400 multiplied by 1,10 for other compensation, the end result indicates again a ratio of about 84% between the average teacher salary of €45,168 in these 9 countries and the average remuneration of senior staff at university.

Therefore, this analysis reflects that school teachers' salaries are about 15% lower than academic staff.

- The flat rate for costs not associated with the preparation and delivery of teaching programs

The lump sum includes a flat rate for costs not associated with the preparation and delivery of teaching programs. Learning EU initiatives is the same action than a Jean Monnet Module. Therefore, the flat rate covers exactly the same activities including the non-teaching staff costs (for assistants, administrative staff, etc.), travel and subsistence costs, dissemination costs, interpretation costs and other costs linked to event organisation, teaching materials, etc.

Consequently, the flat rate proposed for EU learning initiatives will re-use the 40 % top up used in Jean Monnet Modules.

In summary, the following formula has been applied: "Total number of teaching hours for a 3 years period* country teaching rate from Jean Monnet modules country teaching rate*(85% to reflect salary difference between university staff and school teachers * (140%) top-up *80% co-financing"

Similar to Jean Monnet Chairs and Modules, initial results following this method were further updated with the inflation rate over the period January 2021-May 2023

This gives the following end result for the lump sums:

| Learning EU initiatives | | | | | |
|--|------------------|------------------|------------------|------------------|------------------|
| Groups of countries²² | Tranche 1 | Tranche 2 | Tranche 3 | Tranche 4 | Tranche 5 |
| | 120-150 | 151-180 | 181-210 | 211-240 | ≥241 |
| Bulgaria, Romania, Republic of North Macedonia, Liechtenstein, Serbia | 12.250 | 14.750 | 17.250 | 19.750 | 22.000 |
| Turkey, Croatia, Latvia | 14.250 | 17.500 | 20.750 | 24.000 | 27.250 |

²² If new countries will join the program, their participation would be included in the same group of living conditions as the one established for Jean Monnet Modules

| | | | | | |
|--|--------|--------|--------|--------|--------|
| Hungary, Poland, Lithuania, Czech Republic, Estonia, Slovakia | 16.000 | 19.500 | 23.500 | 27.000 | 31.000 |
| Portugal, Greece, Slovenia, Malta | 20.000 | 24.000 | 28.000 | 32.000 | 35.000 |
| Cyprus, Iceland, Spain, Italy | 23.500 | 29.000 | 34.000 | 35.000 | 35.000 |
| Ireland, France, Finland | 27.000 | 33.000 | 35.000 | 35.000 | 35.000 |
| Belgium, Denmark, Germany, Luxembourg, Netherlands, Austria, Sweden, Norway | 30.000 | 35.000 | 35.000 | 35.000 | 35.000 |

3.1.5 Erasmus Mundus Joint Master -Design Measures

3.1.5.1 Nature of the action

The Erasmus Mundus Joint Master Design Measures (EMJM-DM) is a new independent action aiming to facilitate the setting up of new joint master programmes in the framework of new partnerships and to involve Erasmus Mundus underrepresented regions, institutions and thematic areas.

3.1.5.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

Under the former Erasmus+ Programme, there were no design / accompanying measures linked to the Erasmus Mundus Joint Master Degrees. In this sense, the EMJM – Design Action is a new initiative. However, similar actions (‘accompanying measures’) have been running under the earlier funding generation (2007-2013).

- The grants awarded (based on real costs) under the Lifelong Learning Programme – Accompanying Measures Erasmus action (2007 – 2013, LLP-AM) have been taken as reference action for the following reasons: Similar target field (higher education) and beneficiaries (mainly higher education institutions);
- Similar objectives, namely contributing to the modernisation agenda of Higher Education and enhancing the implementation of Erasmus Mobility. The LLP-AM Erasmus gathered different European higher education institutions (HEIs) into small

consortia (consortium size between 2 to 25 partners) to discuss cooperation on concrete topics in an academic setting²³;

- Comparable duration of the agreement (12 to 18 months);
- Same range of eligible activities and related cost items. Both actions consider as eligible academic staff costs (for preparation time and course revisions), international travels (to consortium meetings, e.g.), small equipment (promotion material), subcontracting (experts, website designer, ad hoc studies) and indirect costs.

As for the EMJM-DM, in the LLP-AM, beneficiaries were expected to identify a number of work packages, to which they could allocate different costs. An analysis of the (real) costs reported by the 45 beneficiaries shows a large variation between the costs reported (see last column of the table below). This variation reflects the different needs and situation of the partner institutions and is expected to be comparable for the EMDM.

Indeed, some consortia may already have had a prior (research, teaching) cooperation or may be already advanced in some aspects of their cooperation (e.g. curriculum development). Therefore, they need to have the flexibility to focus on specific topics, which may generate different costs.

In the table below, an overview of all 45 projects grants (funded between 2007 and 2013 under LLP-AM) per cost category is provided, on the basis of which the average grant amount per project was calculated.

| | Total paid LLL-AM- Erasmus (€, 45 projects) | Average grant contribution per project (€) | Range (€, minimum and maximum across 45 projects) |
|------------------------------|--|---|--|
| Staff costs | 3 223 769 | 71 639 | 22 000 to 123 200 |
| Travel and subsistence costs | 894 110 | 19 869 | 0 to 63 188 |
| Equipment | 7 254 | 161 | 0 to 1 185 |
| Subcontracting | 357 036 | 7 934 | 0 to 34 494 |
| Other costs | 1 120 736 | 24 905 | 0 to 81 485 |
| Indirect costs | 317 731 | 7 061 | 0 to 9 813 |
| Total | 5 920 635 | 131 570 | 70 000 to 150 000 |

The average grant amount per project for the LLP-AM Erasmus was thus € 131 570, whereby the Union grant contribution covered maximum 75% of the total eligible costs. The actual total costs for one LLP-AM project can be estimated at € 175.427.

Furthermore, an indexation of 6.77%²⁴ is applied in order to adapt the costs to the current price levels, which leads to an average cost of € 187.303 per project.

²³ LLP-Accompanying Measures: https://eacea.ec.europa.eu/sites/2007-2013/lifelong-learning-programme_en

²⁴ Eurostat, Harmonized Consumer Price Index for EU-27, 2015 = 100; whereby 2013 MTH1 = 98.34 and 2020 MTH5 = 105.00; <https://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>

The EMJM-DM action is intended as an incentive to further cooperation and internationalization, but not as a full-fledged funding scheme of these activities. The aim is to cover specific activities related to the preparation of a joint programme, but it can be reasonably expected of the higher education institutions involved to co-finance most of the activity cost. This applies in particular to the staff costs, comprising also regular academic tasks related to e.g. curricular activities, developing student monitoring mechanisms and joint teaching approaches. Moreover the agreement of the institutions to cover a substantial part of the costs will be a sign of their commitment and therefore a guarantee for the long term sustainability of the endeavor.

The Union contribution to the grant was therefore initially set at 55.000 EUR per project, which was a funding rate of 29.36 %.

| Erasmus Mundus Joint Master Design Measures | |
|---|--------|
| LUMP SUM | 55.000 |

2023 studies further analysed the adequacy of the lump sum for EMDM projects, with two-step methods, which include the primary data collection of the EMDM projects beneficiaries in the Call of 2021 and the analysis of official education indicators with a focus on educational staff wage, collected from OECD.

The quantitative data shows a slightly higher demand on the financial support to support staff costs. In this perspective, since the majority of the budget is allocated to cover staff costs, statistical data analysis helped to provide a quantification of the possible increase in the granted amount. According to the official data analysis conducted using OECD indicators, the EMDM lump sum is adjusted to 60,000 EUR for Call 2024.

3.1.6 Sport - Small scale partnerships

The nature of this action and the method to determine and update the amount of Union contribution are the same as in paragraph [3.2.2](#) under Annex 1 above, with the only difference that the action is managed directly by EACEA.

3.1.7 Cooperation partnerships in the fields of sport, Education and Training, Youth (European NGOs)

3.1.7.1 Nature of the action

This is the part managed by EACEA of the action Cooperation partnerships, described under paragraph [3.2.1](#) in Annex 1 above.

The primary goal of this action is to allow organisations and institutions to increase the quality and relevance of their activities and/or develop and reinforce their networks of partners, thus increasing their capacity to operate jointly at transnational and international level, boosting internationalisation of their activities, exchanging new practices and methods, as well as sharing and confronting ideas.

3.1.7.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

The nature of this action and the method to determine and update the amount of Union contribution are the same as in paragraph [3.2.1](#) under Annex 1 above, with the only difference that the action is managed directly by EACEA.

3.1.8 Civil Society Cooperation in the field Education and Training and in the field of Youth

3.1.8.1 Nature of the action

The Civil Society Cooperation (CSC) actions in the fields of Education and Training (E&T), and in Youth are operating grants for organisations working in the areas specified. The objective of the action is to support the functioning of these organisations. These organisations aim at facilitating cross-country cooperation to promote knowledge and policy transfers for learning and supporting EU objectives and priorities among the relevant stakeholders as well as relay their views to the Commission.

The CSC action provides structural support to 2 categories of stakeholders in the fields of Youth and E&T:

- European non-governmental organisations (ENGOS);
- EU-wide networks (formal for E&T; informal for Youth)

The Civil Society Cooperation actions existed in both the 2007-2013 and the 2014-2020 Erasmus+ programmes. In 2014-2020, the funding model was unit cost based with two unit costs defined (staff costs and statutory meetings)²⁵. This model facilitated the execution of the grants for the stakeholders because of their simple set-up and support of essential functions within the organisations. A move to lump sum funding model for future operating grants would simplify even more the applicants' and beneficiaries' project management: the previous use of unit costs entailed extra calculation for the final grant (number of staff and number of meetings). The new lump sum model will be based mainly on staff costs and would simplify the implementation of the action by reducing the administrative burden of the recipients which are largely small sized organisations doing work directly with education and training, and youth target populations. As a knock-on effect, it would also simplify the reporting and payment analysis for the EU services allowing a faster delivery of grant for the benefit of the stakeholders.

3.1.8.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

The main cost category of organisations working on civil society cooperation is 'staff costs' as confirmed by the real cost data supplied for the 2022 CSC selection funded with budget-based model. Data collection at reporting and submission stage shows that staff costs make up between 65 and 80% of total costs. The remaining costs are to be classified as 'other eligible costs' (subcontracting, travel and subsistence, equipment and other goods, works and services). In order to cover the main driver of eligible costs, and in order to ensure respect of sound financial management, the lump sum funding will be essentially based on 'staff costs'.

The data used in order to determine the lump sum was collected from final reports of projects selected in 2020 (ENGOS and EU-wide Networks). Even though the action was funded with

²⁵ C(2014) 6145 final: Commission Decision authorising the use of reimbursement on the basis of unit costs for the Civil Society Cooperation actions under the Erasmus+ Programme

unit costs, the final reports provided documentation on real staff costs incurred (payslips of staff in education, training and youth organisations). In addition, the reports provided data on number of employees per organisation.

The analysis of data reveals that there is a wide spread in salary levels. The average yearly salary level in the sample for the CSC E&T employees was approximately EUR 37.000 and EUR 27.000 for youth, with the average number of staff being respectively 5.05 and 4.1.

The table below shows the basic information used for the lump sum funding levels.

| Field | Sample | Average salary (rounded) | Standard deviation |
|----------------|--------|--------------------------|--------------------|
| E&T | 106 | 37.000 | 17.000 |
| Youth | 329 | 27.000 | 15.000 |

As the data collection of salaries showed a wide variation, it is proposed to:

- Differentiate the funding of Youth organisations from the Education and Training organisations,
- Set three lump sum amounts depending on the number of staff (between one and two, between three and four, and five or more) for ENGOs and informal networks,
- Distinguish between ENGOs and EU-wide formal networks for E&T (an umbrella organisation of European non-governmental organisations (ENGOs)).

The average total costs of the 2022 E&T projects was EUR 155.000²⁶. Applying the co-financing rate for this action of 90% results in a lump sum contribution of EUR 140.000.

Taking into account the average salary level of EUR 37 000, the contribution of EUR 140.000 is set as the middle value lump sum of between 3 and 4 staff.

| E&T (figures in EUR) | | | |
|----------------------|-----------------|---------------------|----------------|
| Average tot cost | 90% cofinancing | average staff costs | average #staff |
| 155.000 | 140.000 | 37.000 | 3,78 |

From this, regression analysis is used to determine the amounts for the other contributions for actions with one to two staff (EUR 105.000), or more than five (EUR 175.000).

Based on the 2020-2021 data of the selected organisation, the average costs after applying the 90% co-financing for EU-wide formal Networks was EUR 530.000. However, due to the maximum amount of the grant set in the work programme, this is limited to EUR 330.000. The methodology of this specific category has been therefore based on the multiplication of the average staff costs (EUR 37.000) by the number of staff.

Consequently, the maximum grant allowed by the call being EUR 330.000 the same extrapolation has been used to determine the amount for the other contribution with seven to eight staff.

Education and Training

| | N° of staff per organisation | Lump sum proposed |
|--|-------------------------------------|--------------------------|
|--|-------------------------------------|--------------------------|

²⁶ The budget higher than EUR 200.000 have been excluded for this calculation since they result in a grant largely above the maximum grant amount set by the Call.

| | | | |
|-----------------------------------|-----------------------------|---------------------------|-------------|
| CSC Education and Training | For European ENGOs | From 1 to 2 staff members | EUR 105.000 |
| | | From 3 to 4 staff members | EUR 140.000 |
| | | 5 or more staff members | EUR 175.000 |
| | For EU-wide formal Networks | From 7 to 8 staff members | EUR 280.000 |
| | | 9 or more staff members | EUR 330.000 |

Youth

Applying a similar method for youth, the total average cost for 2022 projects was found to be EUR 126.000. Applying the co-financing rate of 80% resulted in a lump sum contribution of EUR100.000. Taking into an average staff cost of EUR 27.000, this lump sum contribution corresponds to the middle lump sum value for between 3 – 4 staff.

| Youth (figures in EUR) | | | |
|------------------------|-----------------|---------------------|----------------|
| Average tot cost | 80% cofinancing | average staff costs | average #staff |
| 126.000 | 100.000 | 27.000 | 3,70 |

Again, applying regression analysis and the maximum amount of the grant to this contribution of 100.000 leads to amounts of EUR 75.000 and 125.000 for the other lump sums of between 1 and 2 and more than 5 staff:

| | | | |
|------------------|--|---------------------------|-------------|
| CSC Youth | For European ENGOs and EU-wide informal Networks | From 1 to 2 staff members | EUR 75.000 |
| | | From 3 to 4 staff members | EUR 100.000 |
| | | 5 or more staff members | EUR 125.000 |

In order to assess the reliability of these lump sum contributions, a simulation based on 2022 selected ‘projects’ with this methodology shows:

- Youth: new budget within error margin (<3%): EUR 4.450.000 vs EUR 4.262.007.
- E&T: new budget has increased due to both the new co-financing rate of 90% (i/o80%) and the global increase of the maximum amount (EUR 125.000 to EUR 175.000) EUR 2.614.668 vs EUR 3.725.000.

The table below shows the global view of the lump sum funding levels for CSC E&T and Youth for 2023-2027.

| | | N° of staff per organisation | Lump sum proposed |
|-----------------------------------|--------------------|------------------------------|-------------------|
| CSC Education and Training | For European ENGOs | From 1 to 2 staff members | EUR 105.000 |
| | | From 3 to 4 staff members | EUR 140.000 |
| | | 5 or more staff members | EUR 175.000 |
| | | From 7 to 8 staff members | EUR 280.000 |

| | | | |
|------------------|--|---------------------------|-------------|
| | For EU-wide formal Networks | 9 or more staff members | EUR 330.000 |
| CSC Youth | For European ENGOs and EU-wide informal Networks | From 1 to 2 staff members | EUR 75.000 |
| | | From 3 to 4 staff members | EUR 100.000 |
| | | 5 or more staff members | EUR 125.000 |

The number of staff employed per organisation will be checked by the Agency at final report stage.

3.2 Method to determine the amount of the Union contribution in the form of lump sums contributions for the following actions

- European Higher Education Area (EHEA) – Initiative to support to the implementation of the reforms
- Jean Monnet Centres of Excellence in the field of Higher Education
- Jean Monnet Policy Debate: Networks in the field of Higher Education and in other fields of education and training
- Jean Monnet Teachers Training in other fields of education and training
- National Academic Recognition Centres (NARIC)
- European Universities
- Support for further implementation of the graduate tracking initiative
- Partnerships for Innovation: Alliances
- EPAL - Electronic Platform for Adult Learning in Europe
- Support to better knowledge in youth policy
- eTwinning - National Support Organisations
- EQAVET - European Quality Assurance in Vocational Education and training - designated bodies
- Partnerships for Innovation: Forward looking
- The International Computer and Information Literacy Study (ICILS)
- National units for the Eurydice network
- Implementing renewed priorities for the European Agenda for Adult Learning
- TALIS - Teaching and Learning International Survey
- PIAAC - Programme for the International Assessment of Adult Competencies
- EUROSTUDENT VIII - Social dimension of European Higher
- The International Association for the Evaluation of Educational Achievement (IEA) - International Civic and Citizenship Education survey (ICCS)
- European Youth Together (Large scale and small scale)
- Capacity building in the field of youth
- Capacity Building in the field of VET
- Capacity Building in the field of Higher Education
- Capacity Building in the field of Sport
- EU Youth Dialogue: support to National Working Groups
- Partnership for Excellence - Centres of Vocational Excellence
- Partnership for Excellence – Erasmus+ Teacher Academies
- Policy Networks (EQF, EUROPASS, EUROGUIDANCE)
- National Erasmus Offices -NEOs
- Erasmus+ Virtual Exchanges

- Social Inclusion and Common Values
- European policy network on teachers and school leaders
- European policy network in the field of education of children and young people with a migrant background
- European policy experimentations

The amount of the single lump sum contribution will be determined for each grant based on the estimated budget of the action proposed by the applicant. The granting authority will fix the lump sum of each grant based on the proposal, evaluation result, funding rates and the maximum grant amount set in the call.

Based on these principles the following steps will be taken to calculate the amount of the lump sum contribution:

3.2.1 Grant proposal

Applicants will provide an estimated budget for the work to be carried out under the action (using the submission form template). The budget will be split into work packages and eligible cost categories, by beneficiary and its linked third party, as explained below

The applicants must fill in a detailed budget table, which enumerates the costs of each beneficiary in the categories listed under point 1.

- a) The applicants must provide in their proposal a breakdown of the lump sum showing the share per work package (and, within each work package, the share assigned to each beneficiary and linked third party);
- b) The proposal must describe the activities covered by each work package;
- c) Proposals for lump sum grants must contain the resources and a detailed cost estimate per work package and per beneficiary and linked third party;
- d) Indirect costs should be calculated by applying a flat rate of 7% to the direct cost;
- e) The co-financing rate will be applied to the total estimated eligible costs, using the funding rate approved in the work programme.

3.2.2 Evaluation

- a) Proposals will be evaluated according to the standard evaluation procedures with the help of internal and/or external experts. The experts will assess the quality of the proposals, against the requirements defined in the call and the expected impact, quality and efficiency of the action.
- b) Experts will need to have the necessary financial know-how as they will also have to check the estimated budget and verify whether the resources proposed, and the split of work packages, allows the achievement of the activities and expected outputs. For each work package, the estimated budget will be assessed for accuracy and if the appropriateness of the resources proposed and the split of lump sum shares allows achieving the activities and expected outputs, to be achieved in the light of the proposed resources.
- c) To ensure equal treatment and benchmark the estimated activities and costs, the experts will consult statistical, historical or any other appropriate data on costs and resources from previously comparable funded projects, and will check that the correct indirect cost and co-financing rate have been correctly applied.

d) They will propose to remove some ineligible costs and/or actions from the proposal, as e.g. cost of activities outside the eligibility period, costs not permitted in the action, indirect cost included as direct cost.

e) They will check that the costs proposed are in line with the call specifications, the appropriateness of the split of the work packages and the quality of the outputs

3.2.3 Determination of the lump sum amount

a) Following the proposal evaluation, the authorising officer will establish the amount of the lump sum, taking into account the findings of the assessment carried out (including recommendations from the evaluation committee). If cost or activities items are adapted, the lump sum and the lump sum breakdown are modified accordingly during grant preparation.

b) The final lump sum is included in the grant agreement as the maximum grant amount. It is calculated by the granting authority by applying the reimbursement rate set out in the call to the total estimated eligible costs in the detailed budget table.

c) The minimum and maximum amount established in each call will be respected.

3.3 Method to determine the amount of the Union contribution in the form of unit contributions for Erasmus Mundus Joint Masters (EMJM), including Erasmus Mundus Joint Masters – Additional scholarships for targeted regions of the world

3.3.1 Justification

The EMJM aims to enhance the attractiveness and excellence of European higher education in the world and attract talent to Europe, through a combination of a) institutional academic cooperation to showcase European excellence in higher education, and b) individual mobility for all students taking part in the EMJM, with EU-funded scholarships for the best students applying.

The tangible outputs are the selected international EMJM study programmes, at Master course level, jointly delivered and jointly recognised by HEIs established in Europe, and open to institutions in other countries of the world; as well as the graduates of these master programmes.

The new unit cost system will entail three key features:

Firstly, there will be a new unit cost system for student scholarships, leading to a significant simplification for the students and for the consortia managing the scholarships.

Secondly, more visibility will be given to the institutional support of the action.

Thirdly, a unit costs system will be implemented for special needs allowances, contributing to additional costs of students with disabilities.

3.3.2 Method to determine and update the amount of the Union contribution in the form of unit contributions

3.3.2.1 Institutional unit contribution calculation

Under the former EMJMD (2014-2020), the funding ratio was approximately 5% of the grant for the management of the consortium delivering the joint master programme (in the form of a lump sum) and 95% for the scholarships (as unit costs). However, these scholarships also included 'participation costs' (namely tuition fees, insurance, etc.), which in reality were directly claimed by the consortium to cover their running costs. In the EMJM, these participation costs and the management lump sum will be merged into a new single institutional

unit cost. At the same time, the institutional unit cost system proposed creates an incentive for the consortia to recruit self-funded students, which will increase their chances of becoming fully sustainable after the project lifetime. In this sense, it is preferable over the lump sum system as it was in vigour under the EMJMD project generation and will allow for a more balanced contribution (in other words: programmes that attract more students will obtain more institutional funding).

Similarly, to the student scholarship contributions, a monthly unit cost will be introduced, based on the number of enrolled students. This institutional unit cost will be the same for all types of students (with or without scholarship) and will cover a proportionally larger share of the actual cost to implement a master programme (approximately 80%).

As the EMJM action is open to HEIs from all over the world, statistical data covering a larger area than only the EU or the Erasmus Programme Countries is required. The 2019 OECD Education Indicators published in the OECD report: Education at a glance 2019²⁷, provide an estimate of the average institutional cost per student for all types of education in all OECD countries. The publication provides the total expenditure on educational institutions per full-time equivalent student as an average for all OECD countries (37 countries), which is an appropriate basis to estimate the average cost of a student in a master programme organised between higher education institutions in different countries from all over the world.

The indicators on which the OECD figures are based²⁸ provide an assessment of the institutional cost per student (as a national average). Expenditure per student on educational institutions is influenced by core educational activities (teachers' salaries and pension systems, instructional and teaching hours, the cost of teaching materials and facilities), ancillary services (i.e. costs related to student welfare, at tertiary level) and R&D activities (laboratories, equipment, libraries etc.). The expenditure per student on educational institutions at a particular level of education (tertiary – long cycle in the case of Erasmus Mundus) is calculated by dividing total expenditure on educational institutions at that level by the corresponding full-time equivalent enrolment. Excluded from these indicators are e.g. costs for countries' education ministries and other non-institutional investments. The Erasmus Mundus Joint Masters aims to cover the same institutional costs (core educational activities, ancillary services and research and development costs) and therefore the OECD figures are considered an appropriate proxy.

Benchmarking the average OECD data against average data for 23 EU countries results in a ratio of 98.9/100 and confirms the relevance of the data²⁹.

The total expenditure on educational institutions per full-time equivalent student for tertiary education of the long cycle (applicable to master level education as offered under the EMJM) amounts to 16 576 USD-PPP per student per year for the average OECD country³⁰.

As the EMJM involve a minimum of three HEIs from different countries, and often more, taking the OECD average (ranging between high national averages of 51.000 USD for LUX and the lowest of 7.143 USD for LV) is still preferable over applying separate country unit cost rates. Calculating this combination of rates per country would be highly complex. Often students in the same programme follow entirely different mobility paths (not all students study at all

²⁷ https://www.oecd-ilibrary.org/education/education-at-a-glance-2019_f8d7880d-en

²⁸ For more information on the applied Methodology, please see the OECD Handbook for Internationally Comparative Education Statistics 2018 and Annex 3 for country-specific notes (<https://doi.org/10.1787/f8d7880d-en>).

²⁹ (Figure C1.2)

³⁰ https://www.oecd-ilibrary.org/sites/f8d7880d-en/1/2/4/1/index.html?itemId=/content/publication/f8d7880d-en&_csp_=b2d87f13821f45339443c7ca94aaf46&itemIGO=oecd&itemContentType=book#tablegrp-d1e18349

partners of the consortium), which would require an individually calculated unit cost for each student, each month. Moreover, the institutional contribution of the Union is usually managed centrally by the coordinator, and allocated to the different partners based on the consortium agreement, taking into account the real needs/costs of the different institutions.

An average is therefore likely to be more accurate for the situation of EMJD consortia, and far more easily applicable than country-based rates, which would require specific unit costs for each student. Moreover, OECD data would not allow us to cover all countries worldwide.

Furthermore, this OECD average amount is a generic average and are estimated to be an underestimation for the EMJMs, considering that international master programmes require more organisation than the average national master programmes on which these calculations are largely based. Indeed, an international joint master requires additional coordination (e.g. meetings and staff) and implementation costs (e.g. staff mobility, student services such as help with registration, housing, visa, etc.) in comparison to 'simple' national master programmes.

Using the currency conversion based on the Purchasing Power Parities (PPPs), equalizing the purchasing power of different currencies by eliminating differences in price levels between countries indicated in the same OECD report³¹, the applicable exchange rate is set by the OECD at 0.697 for reference year 2017 in the EU-28 countries, which leads to an equivalent amount of 11.553 EUR per full-time equivalent student per year.

The EMJM action aims to enhance institutional academic cooperation. The commitment at institutional level is crucial to achieve this, so it can be reasonably expected of the higher education institutions involved to express this commitment in a co-financing contribution. For this reason, the Union contribution will be limited to 78% of the OECD estimation of 11.553 EUR, namely 9.011. Like for the student scholarship unit cost (see below) and as the duration of the studies may vary according to the length of the master programme, the unit costs will be defined on a monthly basis: 750 EUR (9011/12).

This leads to an institutional unit cost of **750 EUR** per enrolled student (with or without scholarship) per month for all EMJM programmes.

3.3.2.2 Scholarship unit cost calculation

Under the former Erasmus+ EMJMD action, student scholarships included monthly subsistence costs, travel and installation costs and a participation cost, directly claimed by the consortium (see above). In the new EMJM action, the student scholarships will exclude the participation costs, as scholarship holders will not have to pay for any costs related to their participation in the course, (tuition fees, insurance coverage and any other mandatory costs). The scholarship will thus consist of a monthly unit cost covering subsistence costs, travel costs and installation costs jointly.

The calculation of this monthly unit cost is based on the former EMJMD student scholarships, but applying the same scholarship amount for all students, irrespective of their residence and nationality.

Under the Erasmus+ EMJMD action, the actual student scholarship depended mainly on:

- the student's nationality (either from a Programme Country or Partner Country);
- the student's place of residence (less than 2000km, between 2000km and 3000km and more than 3000km from the first home institution);
- the duration of the master programme (12, 18 or 24 months).

³¹ https://stats.oecd.org/Index.aspx?DataSetCode=SNA_Table4

This led to a scenario in which students could have quite different scholarships while attending the same programme at the same place.

The calculation for the new simplified unit cost is based on the previous unit costs actually paid to the last 3 generations of EMJMD students (2017, 2018, 2019).

In this period, an amount of 53.093.000 EUR was paid as scholarship contribution to travel costs, an amount of 8.846.000 EUR to installation costs and 217.836.000 EUR to subsistence costs. Divided by the numbers of respective student months applicable (number of students, multiplied by either 12 - for 60 ECTS programmes, 18 - for 90 ECTS programmes or 24 - for 120 ECTS programmes), the average scholarship contribution under the EMJMD for the last 3 student generations was 1.284 EUR per month³². The proportion expected to be covered by these unit costs varied between 75% and 95% of the overall costs, considering:

- the distance from the students' residence to their first home institution;
- the obligation for all scholarship holders to study in a minimum of two different Programme Countries;
- additional costs related to the issuing of visas and residence permits, as well as the temporary accommodation needs after their arrival in each study destination;
- the students' destination countries, not known in advance and varying in number in accordance with the JMD structure and/or the scholarship holder needs.

Excluded in these calculations were e.g. travels home in between semesters and/or academic years and family arrangements made by scholarship holders

As these unit costs were defined by the Decision for EMJMD based on 2013 data, the simplified new unit cost should take into account a 6.77 % inflation rate³³. The new unit costs would thus increase to 1.370 EUR per month. Rounded up for communication purpose and ease of calculation, this leads to a monthly unit cost rate of **1.400 EUR per month** for all scholarship holders in all Erasmus Mundus Joint Master programmes.

3.3.2.3 Special needs unit costs calculation

Cost for special needs for the enrolled students (with or without scholarship), in line with the Decision authorising the use of lump sums contribution and unit contributions for the Marie Skłodowska-Curie Actions under the Horizon Europe Programme 2021-2027.

In order to establish a special needs allowance based on unit cost, the MSCA special needs unit costs³⁴ will be applied.

MSCA performed an analysis of costs incurred for researchers/staff members with disabilities (e.g. long-term physical, mental, intellectual or sensory impairments), participating in training and research activities. Based on historical evidence, these costs were grouped according to the average cost of the items or services considered. On this basis, a list of categories was established based on quantitative and qualitative data, each corresponding to a range of costs.

³² Ranging between € 1.389 / mth for 90 ECTS students travelling from >4.000km, to 1.089 / mth for 120 ECTS students from Europe, or less if their studies took place in their country of residence.

³³ Eurostat, rate based on EU 27 (without UK) - HICP index (Index 2015 = 100), whereas 2013 MTH 1 is 98.34 and 2020 MTH 1 is 105.00.

³⁴ For a more detailed justification of the costs and categories applied, please refer to the Decision authorising the use of lump sums contribution and unit contributions for the Marie Skłodowska-Curie Actions under the Horizon Europe Programme - Ares(2021)902919.

Taking into account the existing margins due to different price levels of special needs items or services across countries and the impact that fluctuations in the range from 1 000 to 2 000 EUR have at the lower end of the scale of the categories, the final unit costs were set as follows:

| | | |
|-----------|------------|------------|
| EUR 3 000 | EUR 13 000 | EUR 47 500 |
| EUR 4 500 | EUR 18 500 | EUR 60 000 |
| EUR 6 000 | EUR 27 500 | |
| EUR 9 500 | EUR 35 500 | |

The triggering event for the payment of the special needs allowance will be the enrolment of a student (with or without scholarship) with disabilities whose long-term physical, mental, intellectual or sensory impairments are certified by a competent national authority and of such nature that their participation in the action would not be possible without the special needs items or services.

Beneficiaries shall claim the closest lower rate per student compared to the estimated actual costs of his/her special needs. Special needs allowance may be assessed on a case-by-case basis, in order to further ensure compliance with the principle of sound financial management. Where this assessment shows that the needs described do not match the category of allowance proposed, the Agency may adjust that the category of need be changed to reflect the description.

Costs lower than 3 000 EUR and higher than 60 000 EUR shall not be reimbursed through the special needs allowance.

The amount of the monthly unit contribution shall be calculated as follows:

$$\{(special\ needs\ unit\ x\ (1/number\ of\ months))\}$$

The number of months in the formula above shall correspond to the number of months the special needs items or services were used or produced for implementing the action, depending on the nature of the items or services. For one-off costs, the number of months shall correspond to 1.

Enrolled students will declare what type of items/services are needed and their cost. The applicable unit cost will be identified as the rate corresponding to or immediately lower than the estimated expenses. This unit cost is a contribution, and is not intended to fully cover the actual costs.

The use of the MSCA unit costs for special needs are justified under the EMJM as well, because:

- The EMJM students are from the same target group, namely excellent students/researchers from all around the world, from the same age group, selected on the basis of their excellence with the same kind of training (classroom, group work, etc.) and research (laboratory work, thesis, internships) activities;
- EMJM students with special needs will thus require the same type of assistance in terms of travel, international mobility, infrastructural adaptations, technological equipment and specific services (e.g. assistance by third persons, adaptation of work environment, additional travel/transportation costs) than they need under the MSCA, with similar costs.

Like for the Horizon Europe Programme, inclusiveness is a specific aim of the Erasmus+ Programme. EMJM should be accessible to all students, regardless of their origin, background or the special needs they require

Finally, using the same special needs unit cost scheme means a significant simplification for beneficiaries (universities applying for both EMJM and MSCA grants) and for students (EMJM graduates often enrol in PhD programmes).

| Erasmus Mundus Joint Master | | |
|------------------------------------|--|----------------------------------|
| Institutional unit cost | 750 EUR | per month/per enrolled student |
| Scholarship unit cost | 1400 EUR | per month/per scholarship holder |
| Special needs unit cost | (special needs unit x(1/number of months)) | |

4 Sound financial management and co-financing principles and absence of double financing

The principle of sound financial management, co-financing and no double financing are ensured.

The methodologies explained in section 3 ensures sound financial management since they all aim at establishing an amount which is a proxy of the real costs. The methodologies are based on either costs reimbursed under the previous programme, statistical data or the estimated budget of the beneficiary. The proposed budget in the application will have been assessed via expert judgement based on reference and comparative data to ensure that the submitted information is reasonable, and the overall feasibility of the project.

Co-financing will be ensured by applying the reimbursement rate set out for each action during the preparation of the Grant Agreement. The co-financing is also ensured in actions where the cost covered by the action are not fully covered with the value of the contributions, and in some other actions the use of contributions guarantees the co-financing principle as it was taken into account for the lump sum or unit cost calculation.

Absence of double funding can be ensured by clearly identifying in the call and in the grant agreement all categories of eligible and ineligible the costs and activities which are covered, and subsequently checking in e-Grants or other systems any potential overlapping with other grants awarded to same beneficiary.

DECISION authorising the use of lump sums and unit costs under the Erasmus+ Programme 2021 - 2027

| HISTORY OF CHANGES | | |
|---------------------------|--|--|
| Version | Publication date and Ares Reference | Changes |
| 1.0 | 24/03/2021 Ares(2021)2083983 | Initial version |
| 2.0 | 23/11/2021 Ares(2021)7195205 | <p>Amendment to Annex 1</p> <ul style="list-style-type: none"> • in particular to modify the following sections <ul style="list-style-type: none"> ○ 3.1.4.1 Higher Education, ○ 3.1.4.2 Mobility projects for VET learners and staff, School education pupils and staff, Adult education learners and staff, ○ 3.1.4.3 Youth exchanges and, mobility of Youth workers and Youth participation activities, ○ 3.2.1 Cooperation Partnerships • and to add the following actions: <ul style="list-style-type: none"> ○ DiscoverEU Inclusion action (under section 3.1.9), ○ Support and network functions of National Agencies (under section 3.3) <p>Amendment to Annex 2</p> <ul style="list-style-type: none"> • in particular to modify the following sections <ul style="list-style-type: none"> ○ 3.1.1 XXX ○ 3.1.7 Cooperation partnerships in the field of sport, Education and Training, Youth (European NGOs) • and to add the following actions: <ul style="list-style-type: none"> ○ Virtual Exchanges (under section 3.2), ○ Capacity Building in the field of VET, in the field of Higher Education and in the field of Sport (under section 3.2), ○ Policy Networks (under section 3.2), ○ National Erasmus Offices (under section 3.2), ○ Social Inclusion and Common Values (under section 3.2), ○ European policy network on teacher and school leaders (under section 3.2), ○ European Policy network in the field of education of children and young people with migrant background (under section 3.2), ○ Jean Monnet EU Initiative (under section 3.1.4) |

| | | |
|-----|------------------------------------|---|
| 3.0 | <p>XXXX</p> <p>Ares(2022)XXXXX</p> | <p>Amendment to Annex 2</p> <ul style="list-style-type: none"> • In particular to add the following actions <ul style="list-style-type: none"> ○ Civil Society Cooperation: Education and Training (under section 3.1.8) ○ Civil Society Cooperation: Youth (under section 3.1.8) |
|-----|------------------------------------|---|

Having regard to the Treaty on the Functioning of the European Union,

Having regard to Regulation 2021/817 of the European Parliament and of the Council establishing 'Erasmus+': the Union programme for education, training, youth and sport¹, and in particular Article 18.2

Having regard to Regulation (EU, Euratom) No 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union², and in particular Articles 125 and 181 thereof,

Whereas:

- (1) Given the high number of actions and individual grants under the Erasmus+ programme, there is significant potential for simplification.
- (2) The use of lump sum and unit contributions will reduce administrative burden/costs for beneficiaries and the granting authority, speed up the payment process and facilitate increased focus on the quality of the results.
- (3) Simplified cost options have been implemented in predecessor programmes to Erasmus+ with great success in improving access, simplifying management, and reducing irregularity; simpler funding rules relating to reimbursement of costs can also facilitate a wider range and increased quality of applications, and provide legal certainty to beneficiaries.
- (4) The use of lump sum and unit contributions under the Erasmus+ programme 2021-2027 should therefore be authorised.

THE FOLLOWING HAS BEEN DECIDED:

Sole Article

The use of the Union contribution in the form of lump sum and unit contributions is authorised for education and training, youth and sport actions under the Erasmus+ Programme 2021-2027, for the reasons and under the conditions set out in the Annex.

This Decision amends and replaces the previous Decision authorising the use of lump sums and unit costs under the Erasmus+ Programme, of 23 November 2021 Ares(2021)7195205.

¹ Political agreement between the European Parliament and the Council has been reached on 11 December 2020 and the Regulation is currently in the adoption procedure by the co-legislators.

² Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012 (OJ L 193, 30.7.2018, p.1).

done at Brussels,

*Authorising Officer signature
Director General DG EAC*

Themis Christophidou

Annex I – de-centralised actions – indirect management

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Annex I – de-centralised actions – indirect management

1 Forms of Union contribution and categories of costs covered

1.1 Key Action 1

The Union contribution for mobility actions under Key Action 1 of the Erasmus+ programme shall exclusively take the form of unit contributions for the following categories of eligible costs:

- Organisational support;
- Individual support;
- Inclusion support for organisations;
- Travel support;
- Course fees;
- Linguistic support;
- Preparatory visits;
- Project management;
- Coaching costs;
- Youth participation events support;

The following categories of eligible costs shall be reimbursed on the basis of eligible costs actually incurred:

- Exceptional costs;
- Inclusion support for participants with fewer opportunities.
- System development and outreach activities;

The amounts of the unit contributions to be used shall be calculated in accordance with point 3.

1.2 Key Action 2

Under Key Action 2 of the Erasmus+ programme , the Union contribution shall exclusively take the form of lump sum contributions.

2 Justification

By Decisions C(2013)8550 and C(2017)6864, the Commission authorised the use of simplified forms of grants in the Erasmus+ programme 2014 – 2020, where the use of real costs was limited to a minimum.

The approach to be followed for the programming period 2021-2027 is largely based on the provisions set out in the aforementioned Decisions, with the introduction of additional simplified forms of grants, such as the use of single lump sums for partnerships under Key Action 2. While some unit cost amounts are to reflect the current levels of the cost of living and new needs associated with the programme priorities, the overall structure of the funding mechanism remains unchanged. This is intended to facilitate the transition to the new programming period and was welcomed positively by stakeholders during the consultation process.

These simplified forms of grant shall cover all educational and training sectors, including Higher education (hereafter “HE”), School education (hereafter “SE”), Vocational education and training (hereafter “VET”), Adult education (hereafter “AE”) and Youth under different activities. Unit costs shall be widely used in Key Action 1 as the largest share of the overall programme budget is allocated to learning mobility.

Reimbursement of eligible costs using simplified forms of grants for actions covered by this Decision are considered appropriate because they are high volume, benefit most from automation through the use of web-based forms, are appropriate for implementation in the context of indirect management and provide transparency for final participants.

While great effort has been made to establish harmonised unit contributions for different target groups and activities in Erasmus+, this Decision also recognizes that there are different needs in some areas, which requires a differentiated approach. This is the case particularly for the Learning Mobility actions, which require some variation in order to prevent a negative impact on mobility numbers or budget absorption. For this reason it is justified to set ranges of unit contributions for those cases, which can then be applied by national agencies depending on their particular circumstances.

The use of lump sums, unit costs and flat-rate funding in the Programme has considerably simplified the calculation of the grant amounts in comparison to the 'traditional' system of basing the amount of the grant on a detailed budget of eligible costs per cost category. It has decreased the workload of the contracting authorities and sped up the payment procedure. It also reduces regularity errors on the part of the beneficiaries, thus resulting in lower error rates.

In summary the use of simplified forms of contribution will ensure simplification through:

- greater predictability for grant beneficiaries who can take the pre-established rates into account when submitting their applications making the actions more attractive;
- greater focus on outputs rather than inputs, placing more emphasis on the quality and level of achievement of measurable objectives;
- reduced administrative burden at application and payment stage reducing overheads for NAs and facilitating productivity gains;

- simplified reporting requirements (no certification or formal financial statement to be provided by beneficiaries);
- greater facilitation of the ex-post analysis and further limitation of the risk of error;
- consistency across actions in the Programme where appropriate making it easier for beneficiaries participating in more than one action to manage their budgets;
- less complex funding rules contributing to easier readability of the Programme Guide.

2.1 Nature of the supported actions

2.1.1 Key Action 1: Learning mobility of individuals

This Key Action supports learning mobility activities for individuals in the following fields:

- Higher Education
- Vocational Education and Training (VET)
- School Education
- Adult Education
- Youth activities

Learning mobility is defined as “moving physically to a country other than the country of the sending institution/organisation and of residence, in order to undertake study, training or non-formal or informal learning; it may take the form of traineeships, apprenticeships, youth exchanges, teaching or participation in a professional development activity, and may include preparatory activities, such as training in the host language, as well as sending, receiving and follow-up activities”.

2.1.2 Key Action 2: Cooperation for innovation and the exchange of good practices

This Key Action supports:

- Partnerships for Cooperation, including Cooperation Partnerships and Small-scale Partnerships;

A Partnership is defined as “an agreement between a group of participating organisations in different Programme Countries to carry out joint European activities in the fields of education, training, youth and sport or establishing a formal or informal network in a relevant field such as joint learning projects for pupils and their teachers in the form of class exchanges and individual long-term mobility, intensive programmes in higher education and cooperation between local and regional authorities to foster inter-regional, including cross-border cooperation; it may be extended to institutions and/or organisations from Partner Countries with a view to strengthening the quality of the partnership”.

2.1.2.1 Cooperation partnerships

The primary goal of this action is to allow organisations and institutions to increase the quality and relevance of their activities and/or develop and reinforce their networks of partners, thus increasing their capacity to operate jointly at transnational and international level, boosting internationalisation of their activities (including internationalisation at home), sharing and confronting ideas, exchanging new practices and methods.

2.1.2.2 Small scale partnerships

This action aims at widening access to the programme to small-scale actors and individuals who are hard to reach in education, training, youth and sport. With lower grant amounts awarded to organisations, shorter duration and simpler administrative requirements compared to the cooperation partnerships, this action will aim to reach out to grassroots organisations and newcomers to Erasmus+, reducing entry barriers to the programme for organisations with smaller organisational capacity.

2.2 Risks of irregularities and fraud and costs of control

The risk of irregularity and fraud when using these simplified forms of grant are considered low for the following reasons:

- the inherent risk of irregularity is low due to the fact that the nature of the funded actions are very standardised, and the associated triggering events are straightforward to verify and monitor;
- the population of beneficiaries is mostly experienced and recurrent, and the entrusted bodies (National Agencies) are subject to a standardised approach;
- in order to reduce the risk of fraud and irregularities linked to the use of simplified forms of grants in the Erasmus+ programme, a detailed set of minimum requirements for the internal control system of National Agencies has been defined based on the requirements resulting from the Financial Regulation for indirect management³ implemented by National Agencies under the Erasmus+ programme.

In addition, an assessment of the expected level of risk of error is carried out annually and subsequently the Anti-Fraud Strategy (revised 2020) provides for tailored fraud prevention and protection measures.

As regards costs of control, reporting and control shall focus on the realisation of the supported activity and the achieved results rather than on the eligibility of costs incurred, reducing the workload and scope for error of both programme participants and managing bodies. The whole monitoring system is set up in a manner so as to ensure efficiency and cost-effectiveness of the controls. The possibility for ex post controls of performance is foreseen which can further verify sufficient quality of the outputs.

The Commission can have a high level of confidence in this control system as it builds on past experience. The aggregate multiannual error rate for the implementation of Erasmus+ through NAs was 1% for 2019 which was below the 2% materiality threshold. A limited number of suspected frauds (0-2 per year, <500k per year) have been reported during the period 2014-19 indicating a low inherent risk and that the procedures are effective in both limiting and capturing irregularities.

3 Method to determine and update the amount of the Union contribution in the form of lump sums and unit costs

The basis for the determination of the amounts of the Union contribution set out in this Decision are the previous authorising Decisions C(2013)8550 and C(2017)6864, applicable to

³ These are set out in the delegation agreement signed by each national agency and in the National Agency Guide.

the Erasmus+ programme 2014-2020. This Decision revises and updates the categories and amounts of Union contribution set out in the aforementioned Decisions, and provides the reasoning for each update.

A main element taken into account for the update of the levels of contribution was inflation, calculated on the period between the last update in 2017 (based on 2016 data), and the last available figure for 2020.

Based on Eurostat data, the cumulative EU inflation rate in the period 2017-2020 was 5,8%⁴, therefore an adjustment of 6% was considered as appropriate for a general update of the levels of contribution to the market prices.

In addition to the general adjustment based on inflation, further adjustments were made for each budget category based on historical data, expert judgement and stakeholders' feedback collected during the previous programming period.

In preparation for the 2021-2027 programming period, DG EAC and EACEA constituted a working group on funding rules, including officials from all units involved in the design and implementation of the programme, and organised over 30 consultative working groups with National Agency and programme stakeholders. This allowed to collect relevant feedback from all programme countries on the weaknesses in the funding model for the previous programme and proposals for their improvement in the new one.

In addition, specific studies carried out at sectoral level allowed the Commission to assess the adequacy of the levels of support in the different actions of the programme. Both the "Study on the inclusiveness and adequacy of support for student mobility in higher education under the next Erasmus+ Programme" and the "Study on Simplified Grants for the Future European Solidarity Corps and Erasmus+ Youth actions", carried out in 2019-2020, showed the need to increase the levels of support in order to improve the accessibility and inclusiveness of the programme, particularly towards participants with fewer opportunities or special needs.

As the programme 2014-2020 was already largely based on unit contributions closely aligned to the underlying historic costs, their revision and the introduction of new costs categories in the new programme were mainly based on percentage increases to the amounts defined in the previous programme. Such increases were defined on the basis of an expert judgment by the members of the working group and confirmed by consultations with representatives of the National Agencies. A more quantitative analysis, assessing the adequacy of the unit contributions to the costs actually incurred by beneficiaries, will be carried out by an external contractor in the course of 2021 and will support a subsequent update of this Decision.

The sections below provide the details and the methodology for the determination of the levels of support in each budget category, as well as the specific rules for their application in each of the sectors of the Programme.

3.1 Key Action 1

The eligible categories for Union support in the form of unit contributions under Key Action 1 are the following:

- Travel support
- Organisational support
- Inclusion support for organisations

⁴ Source: Eurostat [HICP - inflation rate \[TEC00118\]](#)

- Individual support
- Preparatory visits
- Course fees
- Linguistic support
- Project management
- Coaching costs
- Physical events support

3.1.1 Travel Support

The system for the definition of travel support was originally established in decision C(2013)8550 and then revised with decision C(2017)6864, based on the study “Mid-term review of simplified grants used in the Erasmus+ programme”⁵. The 2017 revision aligned the contributions to market prices and targeted an average co-financing rate of 80%.

The 2014-2020 rules on travel support were based on distance bands, so participants had flexibility in the choice of the means of transport, while the amount of the contribution only depended on the travel distance in kilometres. However, the Mid-term review study, which contributed to the update of the levels of support, mainly used flight tickets as a reference for market prices, while alternative means of transport (bus or train) were only included in the analysis for distances below 500 km.

For the 2021-2027 programme, the reduction of the carbon footprint has become a horizontal priority for all mobility activities. To this end, participants will be given the choice between regular travel support, with the same amounts as defined in decision C(2017)6864, and “green travel support” with increased levels of contribution when traveling by a low-emissions means of transport such as train or bus.

In the case of “standard” travel support, the use of the same levels of contribution as defined in 2017, without applying the inflation adjustment (6%), corresponds in real terms to a reduction of the co-financing rate from about 80% to about 74%. Applying this reduction reinforces the difference with the “green travel” option and make the latter more attractive, in line with the political priority to reduce the carbon footprint of the programme. Only the amount for the first travel band, corresponding to distances below 100 km, was increased by 15% (see explanation below) and brought from 20 to 23 EUR, assuming that air travel is not used for such distances in most cases.

⁵ <https://eur-lex.europa.eu/legal-content/FR/TXT/?uri=COM:2018:50:FIN>

Table 1: Travel support

| Travel support - standard | |
|-------------------------------|--------------------------|
| Travel distances ⁶ | Amount |
| Between 10 and 99 KM: | 23 EUR per participant |
| Between 100 and 499 KM: | 180 EUR per participant |
| Between 500 and 1999 KM: | 275 EUR per participant |
| Between 2000 and 2999 KM: | 360 EUR per participant |
| Between 3000 and 3999 KM: | 530 EUR per participant |
| Between 4000 and 7999 KM: | 820 EUR per participant |
| 8000 KM or more: | 1500 EUR per participant |

The amounts defined in 2017 are increased by 15% and rounded to the closest multiple of 10 where the participant uses a low-emissions means of transport. Such increase is the result of a combination of the 6% based on inflation and an additional 9% representing a higher level of co-financing offered to activities with a higher impact on the carbon reduction objectives of the programme.

As the original levels of funding, as defined in 2017, corresponded to an average level of co-financing of 80%, in the case of green travel the average co-financing level is brought to 92%. The “green travel” option is not available for the two highest travel bands, as it is considered that in most cases such distances cannot be covered by low-emissions means of transport.

Table 2: green travel

| Green travel support | |
|-------------------------------|-------------------------|
| Travel distances ⁷ | Amount |
| Between 100 and 499 KM: | 210 EUR per participant |
| Between 500 and 1999 KM: | 320 EUR per participant |
| Between 2000 and 2999 KM: | 410 EUR per participant |
| Between 3000 and 3999 KM: | 610 EUR per participant |

⁶ Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission (http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm). The distance of a one-way travel must be used to calculate the amount of the EU grant that will support the round trip.

⁷ Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission (http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm). The distance of a one-way travel must be used to calculate the amount of the EU grant that will support the round trip.

Green travel for Higher Education student mobility

The action “mobility projects for students in Higher Education” does not include a specific contribution for travel, as the related costs are covered by the “individual support” unit contribution, calculated on a monthly basis. However, in order to offer an incentive for the use of more sustainable means of travel also for this category of participants, representing 57% of the total instances of mobility in the programme⁸, an additional support of **50 EUR per participant** is introduced.

The justification for this amount is based on data from the period 2014-2020. During this programming period, the average grant amount requested for travel support, in the sectors where this category was eligible, was 340 EUR⁹. This is also considered to represent the average amount which Higher Education students allocated to travel expenses from their mobility grant. In line with the method used for the determination of the amount of “green travel” support presented above, it was concluded that the amount of the additional support should be 15% of 340 EUR, which corresponds to 51 EUR. For the sake of simplicity, the amount was rounded to 50 EUR.

3.1.2 Organisational Support

This category covers all costs directly linked to the implementation of mobility activities for the organisation, excluding subsistence and travel for participants.

The table below summarises the amounts of Union contribution applicable to each action and is followed by a detailed justification for the choice of each amount for each of the sectors.

Table 3: Organisational support

| Action | Amount of Union contribution (per mobility): |
|---|---|
| Mobility of higher education students and staff | 400 EUR per participant; 230 EUR per participant after 100 participants in the same activity |
| Blended Intensive Programmes in higher education | 400 EUR per participant with a minimum of 15 participants (not involved in the delivery of the programme) and a maximum of 20 funded participants |
| <ul style="list-style-type: none">– Group mobility of school pupils– Group mobility of adult learners– Staff mobility for courses and training– Participation in VET skills competitions– Invited experts– Hosting teachers or educators in training | 100 EUR per participant |
| <ul style="list-style-type: none">– Short-term learning mobility of VET | 350 EUR per participant; |

⁸ Source : Erasmus+ Dashboard

⁹ Source : Erasmus+ Dashboard

| | |
|---|---|
| learners – Short-term learning mobility of pupils – Individual learning mobility of adult learners – Staff mobility for job shadowing and teaching or training assignments | 200 EUR after one hundred participants in the same type of activity |
| – Long-term learning mobility of VET learners (ErasmusPro) – Long-term learning mobility of pupils – Activities with non-associated countries in the field of VET | 500 EUR per participant |
| – Mobility projects for young people and youth workers | 100 EUR per participant |

3.1.2.1 Higher Education

i. Students and staff mobility

The main changes compared to decision C(2017)6864 are the update of the amounts on the basis of inflation and of the policy priorities of the new programme.

The amounts of 350 EUR up to the 100th participant and 200 EUR per additional participant, as defined in the Erasmus+ Programme Guide, were increased by 15% and rounded to the closest multiple of 10, which corresponds to the **two new levels of 400 EUR and 230 EUR**.

The 15% increase is calculated as follows:

- 6% due to the inflation rate between 2017 and 2020, as described above;
- 9% due to the additional costs related with the implementation of new requirements from the ECHE Erasmus+ Charter for the period 2021-2027:
 - Digital mobility management: Implement the European Student Card Initiative: joining the Erasmus Without Paper Network and adapting internal systems to its technical standards, linking to the Online Learning Agreement, regularly feeding information into the dashboard of the Erasmus+ Mobile App;
 - Greening of Erasmus+: promoting environmentally friendly ways of mobility and other activities, handling the proofs of green travel of participants to justify extra funding, greening administrative procedures;
 - Inclusion: promoting and encouraging the participation of individuals with fewer opportunities, administratively handling the extra funding for these participants;
 - Civic engagement of participants and alumni: identifying and promoting relevant opportunities, matching persons to activities, monitoring activities.
 - New mobility features: promoting and managing blended and/or international mobility.

The 9% increase is based on the expert opinion of the Commission as to the estimated additional costs that will be incurred by these new requirements, and after benchmarking against feedback provided by the external stakeholders involved in implementation.

ii. Blended intensive programmes

Blended intensive programmes for students and staff learners is a new activity under the Erasmus+ programme 2021-2027. They will comprise a short-term physical mobility abroad combined with a compulsory virtual component facilitating a collaborative online learning exchange and teamwork. The virtual component will bring the participants together online to work collectively and simultaneously on specific assignments that are integrated in the blended intensive programme and count towards the overall learning outcomes.

For Blended Intensive Programmes, as in the other actions in the field of Higher Education the amount of organisational support is set at **400 EUR per participant**, with a minimum number of 15 and a maximum of 20 participants (not involved in the delivery of the programme).

In this action, organisational support is intended to cover costs related to the preparation, design, development, implementation and follow-up of the programme and delivery of virtual/remote activities as well as the overall management and coordination. Costs may include: production of documents or educational material, rental of rooms, rental of equipment, field trips, excursions, communication activities, translation and interpretation, preparatory visits and administrative tasks. The level of the administrative effort for the organisation of such activities can be considered as similar to the organisation of a regular mobility action. Therefore, the level of contribution under the category “Organisational support” is the same as in the mobility activities for Higher Education students and staff, i.e. 400 EUR per participant.

The limitation in the number of funded participants is due to the high number of fixed costs in the typical budget for the organisation of a blended intensive programme: it is considered that an amount of 8 000 EUR, corresponding to 20 funded participants, can cover the costs for the organisation of a programme even if the actual number of participants is higher.

3.1.2.2 VET, School Education, Adult Education

Compared to the 2014-2020 period, where there was one single amount for organisational support, there will be differentiated amounts during the 2021-2027 period, taking into account the different nature of organisational costs for each type of activity. The amounts were determined on the basis of an analysis of the tasks that beneficiary organisations implement for each type of activity.

Building on the experience acquired during the programming period 2014-2020, it has been found that different levels of Union contribution are appropriate to reflect the nature and complexity of the organisational workload required for each mobility type and to ensure the good quality of organised activities and the capacity of organisations to operate internationally and to acquire the necessary knowledge and experience.

As a result, as opposed to the period 2014-2020, with the same amount of 350 EUR per participant attributed to all activities, the new scheme for the 2021-2027 programme includes three different amounts, corresponding to the levels of organisational effort required for each type of actions. An increased level of organisational support is applied to more complex activities where there are fewer participants and less opportunity for economies of scale, whereas a lower contribution is applied for courses and group activities where there is a large number of participants and better potential for operational savings. As an overall result, the expected total expenditure of the programme on organisational should be lower, while still providing the correct funding across the board.

As detailed in Table 3: Organisational support above, the new amounts are 100 EUR, 350 EUR and 500 EUR. These amounts are based on the expert opinion of the Commission, taking into account experience gained from implementing the actions in the previous programming period and after benchmarking against feedback from stakeholders on the actual costs incurred.

This has shown that lower costs per participant are associated with the organisation of group activities, as in the case of school pupils' mobility, due to the existence of economies of scale. The costs are also lower when the purpose of the mobility is the participation to an activity which was organised by external entity, as in the case of courses, or for the simple invitation of an expert to an activity hosted by the beneficiary. The reduced level of support of **100 EUR per participant** was introduced for these three types of activities.

The basic amount used in the 2014-2020 period, **350 EUR per participant**, is maintained for activities requiring a medium organisational effort, such as short term mobility for VET learners and school pupils, as well as for job shadowing and teaching and training assignments.

ErasmusPro, long-term mobility of pupils and activities with Non-associated countries require an additional organisational effort. Such activities require the definition of a very detailed training plan, intense monitoring and generally higher efforts in terms of logistic arrangements (such as, for instance, costs for visas and/or vaccines). These activities are also highly individualised and involve fewer participants, which reduces the opportunities for economies of scale. For this type of activities, the increased level of support of **500 EUR per participant** applies.

3.1.2.3 Youth

In the Erasmus+ 2014-2020 programme, organisational support was a contribution to costs incurred by organisations related to the preparation, implementation and follow-up of activities. Only in the case of activities in the field of youth, organisational support also covered: subsistence and local transport of participants – renting of premises – training and teaching materials - costs related to trainers, speakers, moderators, lecturers.

In substance, in the Youth field, one single contribution covered both the cost for the organisation and for the mobility activities as such, as opposed to the other sectors where those activities were covered by two separate budget categories/ contributions. The proposed approach for the 2021-2027 period is to align the funding model to the other sectors and have two categories/contributions, one covering preparation, implementation, follow-up, trainers/facilitators costs, rental of rooms and one for subsistence. This approach will:

- Bring consistency across all KA1 Actions of the Erasmus+ Programme;
- Allow to finance blended activities¹⁰, where only organisational support is eligible for the virtual components;
- Provide funding visibility for the activities implemented on top of the mobility activities;
- Provide further flexibility in case of drop-outs;
- Bring in a simpler logic by reducing the complexity of eligible costs covered by the grant item.

¹⁰ Blended learning: study type that involves learning in a combination of modes. Often used more specifically to refer to courses which use a combination of traditional face-to-face teaching work-shops or seminars, and distance learning techniques on-line (such as internet, television, conference calls).

Mobility activities in the field of youth are comparable in terms of complexity and organisational effort to the group mobility activities in the fields of School Education, VET and Adult Education. As explained in the section above, group activities in general are associated with lower organisational costs and benefit from economies of scale. Therefore, the level of unit contribution for youth mobility was harmonised to the contributions for group mobility actions in the other sectors and fixed at the level of **100 EUR per participant**.

3.1.3 Inclusion Support for Organisations

The inclusion support is a contribution to costs incurred by organising institutions related to the preparation, implementation and follow-up of activities in support of (incoming and outbound) participants with fewer opportunities. The individual activities may vary from case to case but they essentially apply to supplementary tasks carried out by projects that aim to actively involve participants with fewer opportunities (providing tailor-made preparation, support and follow-up for them, such as reinforced mentorship).

The new cost category for inclusion support is composed of one unit contribution intended to support the organisation in the extra costs incurred for the participation of people with fewer opportunities and one component based on real costs, to cover the direct needs of those participants.

The component intended for the organisation was set as a fixed amount of **100 EUR** per eligible participant for all sectors.

Typical examples of expenses covered by this category are the following:

- Administrative costs of determining the participant's status, type of fewer opportunities and individual needs
- Estimating and processing costs that need to be covered in non-standard ways (real costs as opposed to unit costs)
- Individualised preparation / pre-departure training for the participant
- Dedicated assistance with logistical arrangements and possible accompanying persons or assistants
- Identifying suitable hosting institutions (this is a standard organisational task but its difficulty is significantly increased because not all potential hosting partner institutions are able or willing to host participants that require stronger individual engagement)
- Additional preparation of staff on hosting side to address the specific needs of the participant

The actual costs of the activities listed above are strongly variable by nature and do not allow to achieve economies of scale, as they depend on the specific situation and needs of each eligible participant. As this cost category is introduced for the first time in the programme, and in absence of statistical data supporting the analysis, the determination of the amount of contribution was based on an expert judgment by the Commission, benchmarked against feedback from National Agencies and other stakeholders. The amount of 100 EUR per participant is considered to be a prudent choice and it will be subject to revision in the next update of the present authorising decision, planned for 2022, with two years of implementation providing a more solid statistical basis.

3.1.4 Individual Support

The category “Individual support” is intended to cover costs directly linked to the subsistence of participants during the activity. In general, the amounts of support depend on the receiving country for the mobility activity.

3.1.4.1 Higher Education

i. Long-term mobility of students and recent graduates

Regarding the cost category “individual support”, different updates were applied to the grant levels for students and for staff. As pointed out by the “Study on the inclusiveness and adequacy of support for student mobility in higher education under the next Erasmus+ Programme”¹¹, the overall EU grant (all cost categories included) covered between 34% and 42% of the overall mobility costs incurred by students in the period 2014-2020. One of the scenarios presented by the study proposed to increase all grant levels by 5%, as an adjustment to cumulative inflation during the period 2014 – 2018.

However, in order to make the update of the grant levels more relevant to the new programming period, the adjustment took into account the inflation rate for the period 2017-2020, corresponding to 6%¹², as described in [section 3](#) above. In addition, the results of the study mentioned above showed that a further increase in the level of contribution would improve the accessibility of the programme for all participants, but in particular for those who have limited own resources to complement the Erasmus+ grants. Therefore, the levels of individual support are increased by 15% in order to contribute to the objective to increase the inclusiveness of the programme, while it is estimated that the Union contribution will remain below 80% of the eligible costs (which themselves are only a part of the actual costs incurred by students (see above)). The table below shows the updated grant levels for mobility to and from the three categories of countries, grouped according to the average cost of living. After the 15% increase, the amounts were rounded to the higher multiple of 10 (in favour of the participant).

The increased level of “individual support”, combined with the cost category of “inclusion support” is also intended to facilitate participation in the programme for participants who cannot afford to cover a high proportion of the cost of mobility with own resources.

Table 4: Individual support for HE students and recent graduates

| Origin/ Destination | Group 1: Denmark, Finland, Iceland, Ireland, Liechtenstein, Luxembourg, Norway, Sweden, | Group 2: Austria, Belgium, Cyprus, France, Germany, Greece, Italy, Malta, Netherlands, Portugal, Spain | Group 3: Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Serbia, Slovakia, Slovenia, North Macedonia, Turkey |
|---|--|--|---|
| Group 1: Denmark, Finland, Iceland, Ireland, Liechtenstein, Luxembourg, Norway, Sweden, | Between 260 and 540 EUR | Between 200 and 490 EUR | Between 200 and 490 EUR |
| Group 2: Austria, Belgium, Cyprus, France, | Between 310 and 600 EUR | Between 260 and 540 EUR | Between 200 and 490 EUR |

¹¹ Ares(2020)3694813

¹² Source: Eurostat - Ref. footnote 4 above

| | | | |
|---|-------------------------|-------------------------|-------------------------|
| Germany, Greece, Italy, Malta, Netherlands, Portugal, Spain | | | |
| Group 3: Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Serbia, Slovakia, Slovenia, North Macedonia, Turkey | Between 310 and 600 EUR | Between 310 and 600 EUR | Between 260 and 540 EUR |

ii. Top up for students and recent graduates with fewer opportunities

Decision C(2013)8550 defined the amount as a range between 100 EUR and 200 EUR per month. As specified above, the average co-financing rate for Higher Education students in mobility was estimated between 34% and 42% in the 2014-2020 period.

In the new programme, reflecting the horizontal priority of inclusion, the level of support for this category of participants shall be increased. The general increase in the level of individual support is already expected to raise the average co-financing to at least 50% for all students. This additional top-up is expected to bring the level of co-financing above 60% for the specific category of students with fewer opportunities, whose definition is set out in the Programme Guide.

The amount is differentiated according to the duration of the activity:

- Long term mobility: the amount is increased to 250 EUR.
- Short term mobility: 100 EUR for a physical mobility activity period of 5-14 days and 150 EUR for a period of 15-30 days

iii. Top up for students and recent graduates in traineeships

Decision C(2013)8550 defined the amount as a range between 100 EUR and 200 EUR per month. In the new programme, in order to simplify and harmonise the approach for all countries, a fixed rate is established at the middle value of 150 EUR per month.

iv. Students and recent graduates from outermost regions and OCTs

In line with decision C(2013)8550, students and recent graduates from outermost regions and OCTs receive a higher amount of individual support due to geographical disadvantages. In order to simplify the previous scheme, the distinction by Country group was eliminated and the level of support is 700 EUR for all participants in this category, corresponding to the middle value used in the previous programme

v. Short term mobility of students and recent graduates

The determination of the amount of support was based on the “study on the inclusiveness and adequacy of support for student mobility in higher education under the next Erasmus+ Programme” undertaken by the PPMI Group. The study itself used as a reference the rates from the short-term blended mobility in the framework of “Learning, Teaching and Training activities” (LTTs) under the Erasmus+ KA2 Strategic Partnerships action. In fact, those activities are very similar in terms of logistic arrangements and related costs. The main difference is that under LTTs, as for all KA2 activities, travel support is calculated separately. In short term-mobility under KA1, instead, in order to ensure consistency within the action, the costs of travel should be covered by the same category of individual support.

The levels of support for short-term blended mobilities under LTTs in KA2, as defined in decision C(2017)6864, are the following:

- Up to the 14th day of activity: 58 EUR per day
- From 15th to the 30th day of activity: 42 EUR per day

During the 2014-2020 period, 10 719 Higher Education students participated in short-term blended mobility activities. The average duration of an activity was 8 days, corresponding to an allowance of 464 EUR, while the average distance travelled was 1 040 Km, corresponding to an allowance of 275 EUR ¹³. Based on these data, the average incidence of travel on the grant amount per mobility is about 60%.

| KA2 short-term blended mobility 2014-2020 | |
|--|---|
| Level of support | - Up to the 14th day of activity: 58 EUR per day - From 15th to the 30th day of activity: 42 EUR per day |
| Average grant per participant | 760 EUR |
| Average distance | 1 040 Km |
| Average travel support | 275 EUR |
| Average duration | 8 days |
| Average individual support | 464 EUR |

As pointed out above, the average level of co-financing in mobility actions for students in Higher Education was between 34% and 42% in the 2014-2020 period and the objective for the new programme is to bring it to 50-60%, as opposed to KA2 actions, where co-financing is generally estimated at 80%. The difference is due to the availability of additional sources of funding from national and regional schemes in KA1, which are not available in KA2. To reflect this difference, the new unit contribution for short term mobility is defined as follows:

| KA1 short-term mobility 2021-2027 | |
|--|---|
| Level of support | - Up to the 14th day of activity: 70 EUR per day - From 15th to the 30th day of activity: 50 EUR per day |
| Average grant per participant (including travel and subsistence) | 560 EUR |
| Average duration | 8 days |

¹³ Source: Erasmus+ Dashboard

The average grant level is 26% lower than in the case of KA2 blended mobility, which is in line with the targeted difference in the levels of co-financing between the two actions.

vi. *Mobility between Programme and non-associated countries – students and recent graduates*

The rates determined by Decision C(2014)6158 , as amended by Decision C(2017)6863 and detailed in the Erasmus+ Programme Guide 2018 are confirmed.

| From | To | Amount |
|--|--|---|
| EU Member States and third countries associated to the Programme | Third countries not associated to the Programme from Regions 1-12. | 700 EUR per month |
| EU Member States and third countries associated to the Programme | Third countries not associated to the Programme from Regions 13 and 14. | As described above in section “Grant support for the mobility of students – Individual support for physical mobility” |
| Third countries not associated to the Programme from Regions 1-12. | Group 1: Denmark, Finland, Iceland, Ireland, Liechtenstein, Luxembourg, Norway, Sweden, | 900 EUR per month |
| | Group 2: Austria, Belgium, Cyprus, France, Germany, Greece, Italy, Malta, Netherlands, Portugal, Spain | 850 EUR per month |
| | Group 3: Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Serbia, Slovakia, Slovenia, North Macedonia, Turkey | 800 EUR per month |

The base rate of 700 EUR per month is maintained for all mobility activities from all EU member states and countries associated to the programme to all third countries non-associated to the programme, except for regions 13 and 14.

Mobility from and towards non-associated countries that are within the geographical zone of Programme countries (regions 13 and 14), namely Andorra, Faroe Islands, Monaco,

San Marino, Switzerland, United Kingdom, and Vatican City is supported with the same rates as intra-EU mobility¹⁴.

In particular, group 1 includes Faroe Islands by analogy with Denmark, Switzerland by analogy with Liechtenstein, and the United Kingdom in continuity with the previous programming period. Andorra, Monaco, San Marino and Vatican City are included in group 2 by analogy with Spain, France and Italy.

Mobility activities from and to the countries listed above, by analogy with intra-EU mobility, are not eligible for travel support.

Staff mobility

Evidence from the programming period 2014-2020 and feedback from stakeholders showed that the considerations made for student mobility do not equally apply to staff mobility, where the levels of funding are higher and sending institutions generally ensure that all sources of funding combined (EU and national) cover the actual costs incurred by participants. In addition, the existence of ranges allows the national authorities to adjust the actual grant amounts to the specific needs. Therefore the funding levels were left unchanged for this category of participants.

Table 5: Individual support for HE staff

| Receiving country | Staff from Programme Countries | Staff from Partner Countries | Methodology |
|--|--------------------------------|------------------------------|--|
| | Min-Max (per day) | Amount (per day) | |
| Norway, Denmark, Luxembourg, Iceland, Sweden, Ireland, Finland, Liechtenstein | 80-180 | 180 | Same amounts as in Decision C(2017)6864. Therefore, no update of the amounts was needed. |
| Netherlands, Austria, Belgium, France, Germany, Italy, Spain, Cyprus, Greece, Malta, Portugal | 70-160 | 160 | |
| Slovenia, Estonia, Latvia, Croatia, Slovakia, Czech Republic, Lithuania, Turkey, Hungary, Poland, Romania, Bulgaria, the Republic of North Macedonia, Serbia | 60-140 | 140 | |
| Partner Countries | 180 | Not eligible | |

¹⁴ In addition to the geographical criterion, these countries are treated as an exception as they are not covered by the External Action Instruments

3.1.4.2 Mobility projects for VET learners and staff, School education pupils and staff, Adult education learners and staff

For VET learners and staff, School education pupils and staff, and Adult education learners and staff, the amounts of contribution are based on Decision C(2013)8550, amended by C(2017)6864.

The programme guides for the period 2014-2020 offered a minimum and a maximum level of support and each National Agency selected its own actual level within that range, based on factors such as number of beneficiaries, availability of other sources of funding and more accurate estimates on the costs of living. The average grant level in the period was always falling between 60% and 100% of the maximum value in the range¹⁵.

For the new programme, the range of contribution levels available to national agencies for individual support was reduced by increasing the lower end of the range by 10%, while leaving the higher end unchanged. This increased amount results from a combination of the adjustment to inflation (6%) and an additional increase aimed to improve the inclusiveness of the programme, as described above.

On the other hand, leaving the higher end unchanged reduces the risk of overpaying and contributes to the objective of a more harmonized programme, more predictability of individual grants, and potential savings.

The resulting update of the levels of support is presented below:

| Category of participants | Country group 1 ¹⁶ | Country group 2 | Country group 3 |
|--------------------------|-------------------------------|-----------------|-----------------|
| Staff | 90 - 180 EUR | 80 - 160 EUR | 70 - 140 EUR |
| VET learners | 35 - 120 EUR | 30 - 104 EUR | 25 - 88 EUR |
| Adult education learners | 35 - 120 EUR | 30 - 104 EUR | 25 - 88 EUR |
| School pupils | 40 - 80 EUR | 35 - 70 EUR | 30 - 60 EUR |

The above are base rates per day of activity. Each NA will decide on exact base rates based on the allowed ranges.

The base rate is payable up to the 14th day of activity. From the 15th day of activity, the payable rate will be equal to 70% of the base rate.

¹⁵ Source: Erasmus+ Dashboard

¹⁶ For Programme Countries

Country group 1: Norway, Denmark, Luxembourg, Iceland, Sweden, Ireland, Finland, Liechtenstein

Country group 2: Netherlands, Austria, Belgium, France, Germany, Italy, Spain, Cyprus, Greece, Malta, Portugal

Country group 3: Slovenia, Estonia, Latvia, Croatia, Slovakia, Czech Republic, Lithuania, Turkey, Hungary, Poland, Romania, Bulgaria, the Republic of North Macedonia, Serbia

For non-associated Countries

Country group 1: Australia, Canada, Japan, Israel, South Korea, Georgia, Argentina, Armenia, Angola, Saudi Arabia, Kuwait, United States, Bahrain, Azerbaijan, Sudan, Saint Kitts & Nevis, St. Vincent & Grenadines, United Arab Emirates, Hong Kong, Lebanon, Vietnam, Mexico, Singapore, Thailand, Taiwan, Moldova, Malaysia, Tanzania, Switzerland, United Kingdom, Faroe Islands, South Sudan, State of Palestine

Country group 2: India, Kazakhstan, Brazil, DR Congo, Chile, Nigeria, Uganda, Liberia, Djibouti, DPR Korea, Uzbekistan, Turkmenistan, Dominican Republic, Jamaica, Belarus, Libya, Syria, Cuba, Yemen, Kenya, Rwanda, Seychelles, Antigua and Barbuda, Brunei, Montenegro, Switzerland, Malawi, Barbados, Saint Lucia, Grenada, Dominica, Uruguay, Albania, China, Philippines, Peru, Venezuela, Panama, Ghana, Chad, Guyana, Egypt, Morocco, Kiribati, Oman, Bosnia and Herzegovina, Iran, Mozambique, Senegal, Mauritius, Qatar, Andorra, Jordan, Indonesia, Laos, South Africa, Ethiopia, Bangladesh, Ecuador, Paraguay, Costa Rica, Ivory Coast, Sierra Leone, Gabon, Haiti, Bahamas, Papua New Guinea, Micronesia, Ukraine, Kyrgyzstan, Russia, Vatican City State, Monaco, San Marino, Andorra

Country group 3: Nepal, Maldives, Tajikistan, Nicaragua, Zambia, Guinea, Congo, Botswana, Belize, Samoa, Marshall Islands, Palau, Tuvalu, Nauru, Cook Islands, Niue, New Zealand, Pakistan, Bhutan, El Salvador, Suriname, Guatemala, Honduras, Somalia, Trinidad and Tobago, Algeria, Columbia, Gambia, Fiji, Solomon Islands, Vanuatu, Cambodia, Zimbabwe, Burundi, Mongolia, Cameroon, Timor-Leste, Sri Lanka, Madagascar, Mali, Togo, Sao Tome & Principe, Tonga, Bolivia, Benin, Lesotho, Macao, Tunisia, Iraq, Burkina Faso, Equatorial Guinea, Central African Republic, Guinea-Bissau, Namibia, Comoros, Eritrea, Myanmar, Afghanistan, Niger, Mauritania, Cabo Verde, Kosovo, Eswatini

Non-associated countries have been attributed to the three country groups in use for intra-EU mobility, as detailed in footnote 16. The attribution was done by adding up the amount of daily allowance and accommodation allowance calculated by the MIPS system for travel of EU officials and applying 80% as an average co-financing rate.

i. Determination of the amounts of unit contribution for School pupils mobility

In the programme 2014-2020 the mobility of School pupils was allowed within the framework of partnership projects under KA2. For the 2021-2027 period, in order to ensure more coherence within the programme, these activities will be financed under KA1.

In order to harmonise the structure of the rules, the level of individual support, which was presented as a single amount in the old KA2 School exchange partnerships, had to be transformed into a range within which National Agency can choose their own level of support, as in the typical KA1 mechanism.

The base for calculation, corresponding to the unit contribution for “individual support” for the same type of activities under KA2 in the Erasmus+ programme 2014-2020, is 58 EUR.

This base is taken as equivalent to the average KA1 VET learner rate in a mid-income country (group 2).

The average rate for country groups 1 and 3 is then calculated based on the same deviation from country group 2 as used for VET learners (+/-18.06%)”

| <i>Step 1</i> | Avg. country group 1 | Avg. country group 2 (base) | Avg. country group 3 |
|---------------|----------------------|------------------------------------|----------------------|
| VET learners | 85 (+18.06%) | 72 | 59 (-18.06%) |
| School pupils | 68 | 58 | 48 |

In the second step, the ranges are created for the three country groups to align the approach with the other types of participants in Key Action 1. In order to take into account the possibility to obtain economies of scale when large groups of pupils take part to a mobility activity, as well as the existence of other sources of funding, the lower end of the range is calculated as 40% less than the average rate, while the higher end is calculated as 15% more than the average. This flexibility is important in case of pupil mobility activities because pupils from different countries typically take part in activities at the same venue during multilateral exchanges. In the final step, rates are rounded to the nearest 10.

| <i>Step 2</i> | Average (base) | Range | Low | High |
|-----------------|-----------------------|------------------------|------------|-------------|
| Country group 1 | 68 | - 40% ; + 15%; rounded | 40 | 80 |
| Country group 2 | 58 | - 40% ; + 15%; rounded | 35 | 70 |
| Country group 3 | 48 | - 40% ; + 15%; rounded | 30 | 60 |

3.1.4.3 Youth exchanges, mobility of Youth workers and Youth participation activities

The contributions are based on Decisions C(2013)8550, amended by C(2017)6864. The funding mechanism was aligned with the other sectors, by separating the items “organisational support”, covered in the dedicated section above, and “individual support”.

i. Individual support for Youth exchanges, Youth workers and Youth participation activities

As mentioned in the section on organisational support above, in the previous programming period, the category “organisational support” in the field of youth included both the costs related to the actual organisation of the activity and the subsistence costs for participants, which were falling under the category “individual support” in all the other sectors of the programme. As a result, the overall levels of support for activities in this field were significantly lower than in the other fields. As the Interim report from the “Study on Simplified Grants for the Future Humanitarian Aid Strand of the European Solidarity Corps and Erasmus+ Youth Participation Activities” pointed out, “both beneficiaries and NAs thought that the amount to support participants with accommodation and subsistence needs to be increased to better reflect the increase in costs of living in many countries”¹⁷.

In a logic of harmonisation of the programme rules, the old category “organisational support”, where the determination of the amounts of support was based on the cost of living in receiving countries, was translated into “individual support” for the new programme. Meanwhile, the component which is specifically intended to cover the organisational costs is now covered by the category “organisational support” described in the dedicated section above.

As a result, the levels of contribution under the category “individual support” for the 2021-2027 are listed in the following table.

Table 6: Individual support for Youth exchanges and Youth workers

| | Youth Exchanges and Youth participation activities (euro per day) | Mobility of Youth Workers (euro per day) |
|-----------------------------|---|--|
| Austria | 45 € | 61 € |
| Belgium | 42 € | 65 € |
| Bulgaria | 32 € | 53 € |
| Croatia | 35 € | 62 € |
| Cyprus | 32 € | 58 € |
| Czech Republic | 32 € | 54 € |
| Denmark | 45 € | 72 € |
| Estonia | 33 € | 56 € |
| Finland | 45 € | 71 € |
| Republic of North Macedonia | 28 € | 45 € |

¹⁷ Ref. Ares(2020)1521596 for the request of services. Interim and final report not published yet.

| | | |
|-----------------------------------|------|------|
| France | 38 € | 66 € |
| Germany | 41 € | 58 € |
| Greece | 38 € | 71 € |
| Hungary | 33 € | 55 € |
| Iceland | 45 € | 71 € |
| Ireland | 49 € | 74 € |
| Italy | 39 € | 66 € |
| Latvia | 34 € | 59 € |
| Liechtenstein | 45 € | 74 € |
| Lithuania | 34 € | 58 € |
| Luxembourg | 45 € | 66 € |
| Malta | 39 € | 65 € |
| Netherlands | 45 € | 69 € |
| Norway | 50 € | 74 € |
| Poland | 34 € | 59 € |
| Portugal | 37 € | 65 € |
| Romania | 32 € | 54 € |
| Serbia | 29 € | 45 € |
| Slovakia | 35 € | 60 € |
| Slovenia | 34 € | 60 € |
| Spain | 34 € | 61 € |
| Sweden | 45 € | 70 € |
| Turkey | 32 € | 54 € |
| Neighbouring Partner Countries | 29 € | 48 € |

3.1.5 Preparatory Visits

In the 2014-2020 programme, organisations taking part in actions in the fields of VET and Youth had the possibility to carry out “Advance planning visits” to the country of the receiving organisations, with the purpose to ensure high quality activities by facilitating and preparing curricular and administrative arrangements, building trust and understanding and setting-up a solid partnership between organisations involved. Such activities receive contributions calculated on the basis of the applicable unit costs, namely travel and individual support in the case of VET, travel and organisational support in the case of Youth.

For the programme 2021-2027, this activity – under the simpler title of “Preparatory visits” will be available for VET, School Education, Adult Education and Youth.

In order to reduce the administrative burden for organisations taking part in such visits, the contribution will take the form of a fixed amount per participant, covering all categories of expenses.

The method for the determination of the amount of contribution is based on the budget item “Transnational project meetings” for Strategic Partnerships under KA2 in the Erasmus+ 2014-2020 programme. This category in KA2 covers the participation in meetings between project partners for implementation and coordination purposes. The contribution is intended to cover both travel and subsistence costs.

Preparatory visits in KA1 are a similar activity with a comparable cost structure, as they consist in short stays abroad of the staff of beneficiary organisations with the purpose to meet partners in a transnational project.

In KA2 Strategic partnerships, the amount of contribution for transnational project meetings was **575 EUR per participant**. The same amount of contribution is therefore established for preparatory visits **in the fields of VET, School Education, Adult Education and Youth**.

3.1.6 Course Fees

Based on contribution set in Decision C(2013)8550. Increased by 6% due to the inflation rate, as described above, and an additional 8% to increase the level of co-financing in favour of beneficiaries, in line with the inclusion priority of the new programme.

New rate: **80 EUR** per day, with a maximum of **800 EUR**.

3.1.7 Linguistic Support

The Erasmus+ Online Language Support (OLS) will allow participants in mobility activities to assess, practice and improve their knowledge of the language to be used during their experience abroad. The platform will provide features such as assisted and blended learning tools to enable teachers and youth workers to provide extra support to their learners and social networking to enable collaborative learning. The Erasmus+ Online Linguistic Support (OLS) will also provide free language learning material.

The cost category “Linguistic support” is intended for participants who are eligible to benefit from the OLS tool, but whose learning needs are not met by this tool as the required language or level is not available.

The amount of contribution is the same as defined in Decision C(2013)8550: **150 EUR per participant** eligible for Online Language Support that cannot receive it, excluding staff in mobility up to 30 days of duration. For learners, the availability of the support is not linked to the duration of the mobility, as it is assumed that all periods of mobility require a linguistic support.

For the 2021-2027 period, a higher level of contribution is introduced for participants in ErasmusPro and long-term individual mobility of school pupils, in consideration of the higher complexity of the activities carried out during the mobility. In the case of ErasmusPro, this entails a period learning abroad at a partner VET provider, in a company, or in another organisation active in the field of VET or the labour market. The learning period must include a strong work-based component and an individual learning programme must be defined for each participant.

In the case of school pupils on long-term mobility, participants spend a period abroad to study at a partner school or perform a traineeship at another relevant organisation abroad. Also in this case, an individual learning programme must be defined for each participant to enable them to follow the curriculum and integrate at their host school.

In view of the above, **linguistic support for participants in ErasmusPro and long term individual mobility of school pupils will be supported with an additional 150 EUR per participant**. The determination of this amount was based on the expert judgment of the Commission, benchmarked against feedback from stakeholders. It is intended to cover the additional needs of participants who are minors or very young adults starting from a lower level of proficiency (compared to e.g. higher education students) and need a strong, individualised linguistic preparation in order to be able to undertake their mobility. In case

OLS is not available, these learners will receive both the regular linguistic support grant to replace OLS and the additional 150 EUR grant to cover their specific needs.

3.1.8 Categories only applicable to Youth Participation Activities

Youth Participation Activities are non-formal learning activities revolving around active participation of young people. Such activities aim to enable young people to experience exchanges, cooperation, cultural and civic action. Supported activities should help the participants strengthen their personal, social, citizenship and digital competences and become active European citizens.

Supported activities can take the form of (or a combination of): workshops, debates, role-plays, simulations, use of digital tools (e.g. digital democracy tools), awareness raising campaigns, trainings, meetings and other forms of online or offline interaction between young people and decision-makers, consultations, information events etc.

As the mobility component is central in the structure of this action, it is financed under Key Action 1 of the program. However, the action also supports a dimension of transnational cooperation, which results in similarities with the structure of Key Action 2 actions. To reflect such characteristics of this action, three new budget categories are introduced, replicating similar categories already existing in KA2:

- Project management
- Coaching costs
- Physical events support

3.1.8.1 Project management

The organisation of Youth participation activities does not only consist in setting up the logistic arrangements for a mobility, but involves preparation, implementation, of activities, evaluation, dissemination and follow-up. In this respect, the typical KA1 “organisational support” unit contribution, based on the number of participants, does not reflect the nature of the funded activities and a contribution based on the duration of the project in months was found to be more adequate.

The cost category “Project management and implementation” under KA2 cooperation partnerships is intended to cover coordination and communication between partners, learning/teaching/training materials, tools, approaches etc. Virtual cooperation and local project activities. Its scope is very similar to project management in Youth participation activities and the rule of allocation is based on the project duration in months.

Based on these considerations, the amount of unit contribution for project management in Youth participation activities is defined as the same amount set out in decision C(2013)8550, as amended by C(2017)6864 for “Project management and implementation” in KA2 and it is set at **500 EUR** per month.

3.1.8.2 Coaching costs

This cost category covers the costs linked to the involvement of a coach in the project.

In this element too, the action presents a similarity with KA2 cooperation partnerships. The participation of a coach to the activity constitutes a staff cost, whose structure is compatible with the cost category “intellectual outputs” in the 2014-2020 programme, renamed as “project results” in the new programme.

The Erasmus+ Programme guide defines a Youth worker as “a professional or a volunteer involved in non-formal learning who supports young people in their personal socio-educational, and professional development” and a coach as “a resource person who could have youth work experience to accompany groups of young people (especially those with fewer opportunities), helping them put their idea in practice, supporting them in the preparation, implementation and evaluation of their project”. Based on these definitions, the responsibilities of the two profiles can be considered as similar and the same unit contribution per day can be applied, corresponding to the category “Teacher/Trainer/Researcher/Youth worker” in KA2 cooperation partnerships.

Table 7: Coaching costs

| | Teacher/Trainer/Researcher / Youth worker Unit contribution per day |
|---|--|
| Denmark, Ireland, Luxembourg, Netherlands, Austria, Sweden, Liechtenstein, Norway | 241 |
| Belgium, Germany, France, Italy, Finland, Iceland | 214 |
| Czech Republic, Greece, Spain, Cyprus, Malta, Portugal, Slovenia | 137 |
| Bulgaria, Estonia, Croatia, Latvia, Lithuania, Hungary, Poland, Romania, Serbia, Slovakia, the Republic of North Macedonia, Turkey | 74 |

3.1.8.3 Youth participation events support

This cost covers the organisation of national and transnational conferences, seminars and events in presential format.

The category Multiplier events in KA2, defined in decision C(2013)8550, as amended by C(2017)6864, provides a contribution to the costs linked to national and transnational conferences, seminars, events sharing and disseminating the results of the project (excluding costs for travel and subsistence of representatives of participating organisations involved in the project). The rule of allocation assigns a contribution of 100 EUR per local participant and 200 EUR per international participant.

In Youth participation activities, the scope of project events is very similar to the Multiplier events category described above. The only substantial difference is that the events are attended by participants who may already be in the location where the activities take place and/or who are also eligible for travel and individual support insofar as they are involved in a

mobility activity. Therefore, for this action, the funding mechanism for “Multiplier events” can be modified by considering all participants as local.

In light of the above, based on the amounts defined in decision C(2013)8550, as amended by C(2017)6864, the amount of contribution for Youth participation events is set at **100 EUR per participant**.

3.1.9 DiscoverEU Inclusion action

The DiscoverEU Inclusion action offers young people who are 18 years old a chance to have a short-term individual or group experience travelling across Europe by rail or other modes of transport where necessary. Participants are provided with a travel pass of seven days within one month and an individual support contributing to subsistence costs during the activity. In addition, organisations are entitled to claim inclusion support (see paragraph 3.1.3 above) for participants with fewer opportunities.

The amount of individual support is set at **62 EUR per participant per day for a maximum of 21 days**. This amount is determined as the average of the rates for youth workers mobility (Table 6 above). This choice is justified by the fact that the profile of participants and the modalities of the mobility are similar, however the activity is intended to take place across different countries and therefore a MS-specific rate would not be appropriate. The choice of the same rate as in youth workers mobility also reflects the fact that, as in that action, DiscoverEU participants have to pay for their accommodation and choose freely on the market, as opposed to youth exchanges where the organisation negotiates the price of accommodation in the same structure for all participants.

In case they need additional travel in order to reach the location where the activity starts, participants are also entitled to travel support, including “green travel” where applicable (see paragraph 3.1.1 above).

3.2 Key Action 2

In the Erasmus+ programme 2021-2027, the action “Partnerships for cooperation” represents the continuation of the “Strategic partnerships” under the 2014-2020 programme.

The main novelty for the new period is the introduction of the new action “small scale partnerships”, aimed at reaching smaller organisations and newcomers, while the action “Cooperation partnerships” presents a substantial continuity with its predecessor. In line with this principle of continuity, the funding model for Cooperation partnerships is largely based on the one of “Strategic partnerships” as defined in decision C(2013)8550 and amended by C(2017)6864.

3.2.1 Cooperation Partnerships

The determination of the amounts of contribution in the form of single lump sums was based on an analysis of project budgets financed under the Strategic partnerships action in the period 2014-2020.

As shown by the graph below, the highest concentration of projects, about 64%, was in the range between 100.000 and 300.000 EUR¹⁸, while project budgets comprised between 300.000 and 450.000 EUR represented about 16% of the total¹⁹.

The 20% of projects with a budget below 100.000 EUR will be covered by the action Small Scale partnerships, described above, with a funding mechanism based on two single lump sums with pre-defined amounts of 30.000 and 60.000 EUR. The two actions, small-scale and cooperation partnerships, should in fact be considered as complementary, as they aim at supporting similar activities but with different levels of complexity, number of partners and involved and expected results.

Figure 1- Distribution of KA2 2014-2020 project budgets

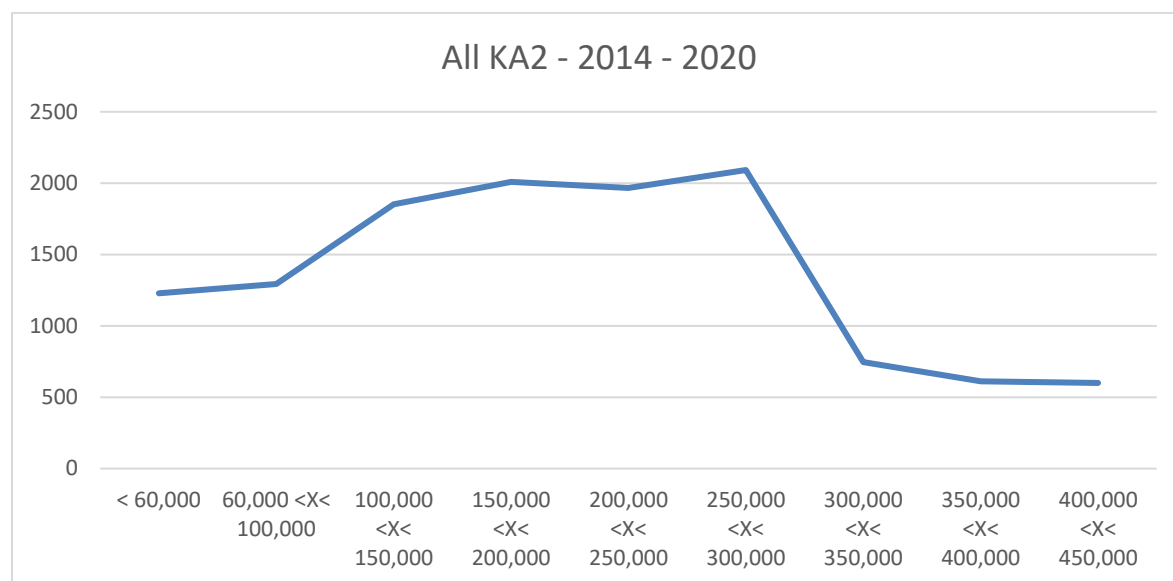


Table 8: Distribution of KA2 2014-2020 project budgets

| | SE | VET | HE | AE | YOUTH | TOT | % |
|---------------------|-----|-----|-----|-----|-------|--------------|-----|
| < 60,000 | 129 | 139 | 2 | 327 | 632 | 1,229 | 10% |
| 60,000 <X< 100,000 | 311 | 233 | 16 | 324 | 409 | 1,293 | 10% |
| 100,000 <X< 150,000 | 530 | 369 | 70 | 464 | 419 | 1,852 | 15% |
| 150,000 <X< 200,000 | 499 | 512 | 190 | 517 | 291 | 2,009 | 16% |
| 200,000 <X< 250,000 | 473 | 549 | 279 | 486 | 179 | 1,966 | 16% |
| 250,000 <X< 300,000 | 430 | 700 | 383 | 473 | 106 | 2,092 | 17% |
| 300,000 <X< 350,000 | 166 | 234 | 218 | 107 | 20 | 745 | 6% |
| 350,000 <X< 400,000 | 142 | 170 | 207 | 86 | 6 | 611 | 5% |
| 400,000 <X< 450,000 | 134 | 159 | 238 | 64 | 5 | 600 | 5% |
| | | | | | | 2,397 | |

Based on the experience from the previous programming period, it is considered that three predefined amounts of 120.000, 250.000 and 400.000 EUR will constitute an adequate and representative menu of funding levels. Combined with the small scale partnerships, this will

¹⁸ Awarded grant amounts

¹⁹ Source: Erasmus+ Dashboard. The analysis did not take into account school exchange partnerships, which had a stronger focus on mobility compared to the other KA2 actions, and therefore has more significant differences with the 2021-2027 cooperation partnerships.

offer applicants a clear and simple set of choices for their projects, allowing them to apply for a level of grant which is in line with the scale of their proposed activities. Given the diverse nature of all the fields covered in the programme, reaching from Education to Training to Youth and Sport, the needs and type of activities will differ. It is therefore left to the applicants to describe the planned activities adequate for their respective objectives and within the funding level chosen. Therefore, the expected outputs corresponding to the amounts are not predefined: on the contrary, a high degree of flexibility is left to applicants to define their targets in line with the programme objectives and build their project around the requested budget.

Based on the table above, the single lump sum of 120.000 EUR targets the type and scope of projects which obtained between 100.000 and 150.000 EUR in the previous programme; the lump sum of 250.000 EUR will target the main bulk of projects which obtained between 150.000 and 300.000 EUR, while the projects requiring a higher level of funding will be targeted by the 400.000 EUR lump sum. Projects which received a grant between 350.000 and 450.000 EUR in the previous programming period represented 10% of the total number and 15% of the budget. Apart from its statistical representativeness, offering this amount also constitutes a strategic policy choice, allowing to finance the most innovative and ambitious partnerships.

As the list of eligible activities and the award criteria for the action are the same for all the three fixed amounts, applicants will choose the desired level of funding based on the level of complexity and ambition of their proposal, taking into account elements such as the number of partners, the duration of the project and the number and type of proposed activities.

In particular, applicants are required to provide evidence for the elements of value for money in their application, showing that the amount requested is adequate to the content and objectives of their proposed activities. Such elements are then assessed by experts in the evaluation phase and influence the position of each proposal in the ranking list, so that proposals which are found to offer poor value for money will have a lower score and fewer chances to be selected for funding. It is therefore expected that projects will rather target a high level of activities with high European added value in order to be successfully selected within their chosen group.

The experts involved in the evaluation of proposals will also be supported by specific guidelines, providing a common methodology to use the information from projects financed in 2014-2020 as a reference for the evaluation of new proposals.

A quality assessment will also be carried out ex-post, based on the information presented in the final reports, with a view to determine the level of achievement of the project objectives stated in the application forms. Insufficient quality, corresponding to a low score in the final assessment, will constitute the basis for the application of grant reductions for poor or partial implementation.

3.2.2 Small Scale Partnerships

i. Determination of the amounts of Union contribution

The funding mechanism for this action will be based on single lump sums of predefined amounts.

In the programming period 2014-2020, the action “Strategic partnerships” funded over 3 550 projects with grant amounts lower than 100 000 EUR, for a total value of 220 million EUR, out of a total of 12 500 projects (28%) and a total budget of 2.1 billion eur (10%).

Within this portion of the projects population, about 2 700 had grant amounts comprised between 50 000 and 100 000 EUR (21% of the total). Their average value was 76 000 EUR, with a duration of 22 months and 4 partners involved. Based on the funding rules applicable in the previous programming period, the typical budget structure was the following:

| Category | Amounts | |
|---------------------------------------|---------------|---------------|
| Project management and implementation | 1 Coordinator | 11 000 |
| | 3 Partners | 16 500 |
| | Total | 27 500 |
| Project meetings | 10 600 | |
| Intellectual outputs | 32 700 | |
| Multiplier events | 5 200 | |

As the figures show, more than a third of the average grant amount was already determined in the form of a lump sum on the basis of the number of partners and project duration (Project management and implementation), while the remaining part, determined on the basis of unit contributions, was used for project meetings, events and intellectual outputs (staff costs).

In the same period, the number of grants with amounts lower than 50 000 EUR was about 850, with an average value of 35 000 EUR, a duration of 16 months and 3 partners.

The first group of grants, with amounts comprised between 50 and 100 thousand EUR, already represented a relevant portion of the population in the Erasmus+ 2014-2020 programme, while the second group with amounts below 50 000 EUR, could be considered as marginal. However, in the Erasmus+ 2021-2027 programme, the objective of the new action “Small scale partnerships” is to increase the involvement of smaller organisations and newcomers to the programme, which translates into a higher number of grants of small amounts. This motivates the choice to propose a standard amount below 50 000 EUR to attract this specific group of beneficiaries.

Based on the analysis above, the average values which would allow to cover the typical costs of projects under the 2014-2020 funding rules are 35 000 and 75 000 EUR. However, in order to stimulate participants to achieve efficiencies and seek the best value for money in their projects, the predefined amounts for the lump sum contributions will be respectively 15% and 20% lower than the average value calculated above. The predefined amounts are therefore the following:

- a) 30 000 EUR
- b) 60 000 EUR.

Applicants will select the requested amount between the two options above, based on the proposed level of complexity, ambition and duration of their project.

The minimum requirements for both budgets are the presence of two partners and the definition of a plan of eligible activities. The completion of the project activities constitutes the condition for the payment of the lump sum contribution.

The adequacy of the selected amount to the proposed project activities and their value for money will be a central element of the quality assessment in the evaluation of proposals at selection stage. Only proposals obtaining a sufficient score in these aspects will be selected for funding.

3.3 Support and network functions of the National Agencies

Apart from their role in the implementation of the programme under a contribution agreement, some National Agencies receive specific Union contributions for the following support and networking functions:

- National VET Team:
- Eurodesk: European youth information network providing information on learning mobility for young people.
- SALTO (Support, Advanced Learning and Training Opportunities): network of resource centres organising trainings for organisations and agencies involved in the Erasmus+ and European Solidarity Corps programmes.

The EU contribution to these activities implemented by National Agencies will take the form of a single lump sum.

The amount of the single lump sum will be determined for each contribution based on the estimated budget of the action proposed by the Agency. The Commission will fix the lump sum of each contribution based on the proposal, evaluation result, funding rates and the maximum contribution amount set in the work programme.

Based on these principles the following steps will be taken to calculate the amount of the lump sum contribution:

3.3.1 EU contribution proposal

National Agencies will provide an estimated budget for the work to be carried out under the action (using the submission form template). The budget can be split into work packages and eligible cost categories.

- a) The National Agencies must provide their proposals in form of activity plans, with a breakdown of the lump sum showing the share per work package (where applicable);
- b) The proposal must describe the activities covered by each work package;
- c) Proposals for lump sum contributions must contain the resources and a detailed cost estimate per work package;
- d) The co-financing rate will be applied to the total estimated eligible costs, using the funding rate approved in the work programme.

3.3.2 Evaluation

- a) Proposals will be evaluated according to the standard evaluation procedures with the help of internal and/or external experts. The experts will assess the quality of the proposals, against the requirements defined in the work programme and the expected impact, quality and efficiency of the action.
- b) For each work package, the estimated budget will be assessed for accuracy and if the appropriateness of the resources proposed and the split of lump sum shares allows achieving the activities and expected outputs, to be achieved in the light of the proposed resources.

To ensure equal treatment and benchmark the estimated activities and costs, the experts will consult statistical, historical or any other appropriate data on costs and resources from previously comparable funded projects, and will check that the correct indirect cost and co-financing rate have been correctly applied.

c) They will propose to remove some ineligible costs and/or actions from the proposal, as e.g. cost of activities outside the eligibility period, costs not permitted in the action.

d) They will check that the costs proposed are in line with the National Agency's work programme specifications, the appropriateness of the split of the work packages and the quality of the outputs

3.3.3 Determination of the lump sum amount

a) Following the activity plan evaluation, the authorising officer will establish the amount of the lump sum, taking into account the findings of the assessment carried. If cost or activities items are adapted, the lump sum and the lump sum breakdown are modified accordingly.

b) The final lump sum is included in the contribution agreement as the maximum contribution amount. It is calculated by the Commission by applying the co-financing rate set out in the work programme specifications to the total estimated eligible costs in the budget table.

c) The maximum amount established for the country allocations in the Commission's Annual work programme will be respected.

4 Sound financial management, co-financing principle and absence of double financing

All methodologies described above and the previous Commission authorising decisions C(2013)8550 and C(2017)6864 comply with the principles of sound financial management, co-financing and absence of double financing as required by the Financial Regulation.

4.1 Reasonable compliance with the principle of co-financing

The amounts set out in this decision are unit and lump sum contributions, meaning that the principle of co-financing has been taken into account in setting the amounts. A maximum rate of co-financing is foreseen for all the actions of the Programme. Notwithstanding the principle of co-financing, the maximum funding rate can be up to 100%, as the beneficiaries will bear additional costs which are not captured by the Union contribution.

The majority of the amounts set in this Decision are based on amounts authorised for the 2014-2020 period. As explained in the authorising decisions for that period, the contribution amounts have been defined so as to ensure they are below, or at least close to, the actual cost of the actions. For example, for the cost category "individual support", the "Study on the inclusiveness and adequacy of support for student mobility in higher education under the next Erasmus+ Programme", calculated that Union contribution covered between 34% and 42% of the overall mobility costs incurred by students. As part of the 2013 assessment for defining the methodology and levels of contribution, the proposed amounts were compared to past grants awarded as well as to the real costs reported. This analysis indicated that amounts are close to the real grants previously awarded on a global basis. Moreover, an analysis of the typical budget structure of similar projects in the past showed that the costs represented by the

unit contribution is normally the largest element (average 75% of total eligible costs) of the eligible cost and that other (ineligible) costs are systematically necessary for achieving the objective of the action. This ensures that even if the unit contribution represents 100% of the eligible costs it covers, the presence of other costs ensure that, overall, the co-financing principle is respected.

Simulations were carried out for each contribution individually, but also by country and by sector (where several sectors are concerned by the same unit cost), to ensure that structural or significant isolated deviations from the historical levels of grant are limited when balanced with the overall goal of a simplicity and attractiveness for beneficiaries, thus ensuring the co-financing principle is respected on an overall basis.

Furthermore, a cap is set for contributions to costs of actions such as Jean Monnet Projects or Key Action 2 Cooperation partnerships to add further assurance to ensuring co-financing on an overall basis, but not necessarily in all projects. The cap has been set with reference to simulated budgets compared to past budgets at a lower level than the simulated total costs. Indeed, the simulations indicate that the average amount of the Union contribution under all grant items achieves the relevant Union co-financing rate as defined in the work programme, thus ensuring the respect of the co-financing principle on an overall basis. The overall co-financing rate of overall grants by action is lower than the individual ones because it takes account of eligible costs which do not receive a contribution (e.g. under the project results support a contribution to staff cost shall be made, but the eligible communication costs shall not be taken into account).

Moreover, it can be verified during assessment stage that for any individual grant there are additional resources necessary for the implementation of the action above that provided by the EU contribution. Detailed guidelines and additional training in this respect shall be provided to the national agencies.

4.2 Sound Financial Management

Sound financial management is ensured because the methodology used to calculate the amounts set out in the decision ensure they are a proxy of the real costs. Moreover, simulations have shown that the proposed methodologies result in amounts that are on average comparable to but below the current real costs and/or real grants given (taking account of at most the maximum level of co-funding), which ensures that the grants remain attractive while respecting sound financial management.

In some cases there will be complementary sources of financing to that of the Union (e.g. some individual mobility actions). When the Union contribution is set within a range (e.g. Individual support), the overall external sources of financing are one of the factors which shall be specifically taken into account when setting the contribution amount within the defined range specified by the Commission. For example, in sending countries where little or no external co-funding is available, the agencies can apply higher ranges than in countries with greater external co-financing sources. In addition, the nature of the actions as detailed in the Work Programme excludes the possibility of generating revenues through the action.

By nature, simplified forms of grant are a proxy of the underlying costs and not an exact reimbursement of real costs. While great efforts have been invested to minimise negative

impacts on any country associated to the programme²⁰, it cannot be avoided that the new approach for 2021 - 2027 might result in different consequences for different countries. As required by the Financial Regulation the impact of the new amounts shall be closely monitored in order to be able to address any undesirable side effects. Intermediate reviews and check-up/control mechanisms are foreseen in order to ensure that the approved methodology is up to date throughout the whole programme period.

Lump sums for small-scale partnerships in KA2

In the case of small-scale partnerships under KA2, lump sum contribution amounts have been set using data from projects implemented in the 2014-2020 period, which themselves were funded using simplified forms of contributions. The amounts can therefore be expected to represent a proxy of the real costs. However, to ensure sound financial management, a further reduction of 15% was applied to the amounts.

4.3 Reasonable compliance with the principle of no double funding

There is no overlap between eligible costs. Unit costs refer to specific individual eligible costs in many cases (e.g. travel, staff costs). Where this is not the case, the funding model ensures that double funding is avoided by requiring additional outputs.

In the present Programme, double funding is prevented already effectively by preventive controls at selection stage, by national and executive agencies and the Commission. The Programme draws clear division lines between actions which reduces the risk that similar activities can be undertaken under different actions by the same participants. Furthermore, double funding is avoided by identifying all categories of eligible and ineligible costs related to the supported activities.

In this respect, as from 2014 applicant organisations have been registered and controlled in order to achieve unique identification and assist monitoring. Use of this unique identity facilitates checking of multiple applications and reduce the potential for double funding. Other tools are also available for national agencies to cross check the content of applications to avoid that the same action is funded twice.

Control of participants in learning mobility will also be possible via the Beneficiary module application that contains details of all mobility participants in mobility projects of the Erasmus+ Programme.

Annex II – centralised actions – direct management

1 Forms of Union contribution and categories of costs covered

1.1 The Union contribution shall exclusively take the form of lump sum contributions for the following actions under the Erasmus + programme

1.1.1 Education and training

a) Key action 1: Learning Mobility

- Erasmus+ Virtual Exchanges

b) Key action 2: Cooperation among organisations and institutions

- Partnership for Excellence: Erasmus Mundus Joint Master Design Measures
- Partnerships for Innovation: Alliances
- Partnerships for Innovation - Forward Looking Partnerships
- Partnership for Excellence - Centres of Vocational Excellence
- Partnerships for cooperation in the field of Education and Training: European NGOs
- European Universities
- EPAL - Electronic Platform for Adult Learning in Europe
- eTwinning - National Support Organisations
- Capacity Building in the field of VET
- Capacity Building in the field of Higher Education

c) Key action 3: Support to policy development and cooperation

- European Higher Education Area (EHEA) – Initiative to support to the implementation of the reforms
- Implementing renewed priorities for the European Agenda for Adult Learning
- The International Association for the Evaluation of Educational Achievement (IEA) - International Civic and Citizenship Education survey (ICCS)
- The International Computer and Information Literacy Study (ICILS)
- EUROSTUDENT VIII - Social dimension of European Higher
- Eurydice: Network of National units
- Support to the European Quality Assurance in Vocational Education and Training National Reference Points EQA(VET)-NRP
- Support for further implementation of the graduate tracking initiative
- National Academic Recognition Centres (NARIC)
- Support to better knowledge in youth policy
- TALIS - Teaching and Learning International Survey
- PIAAC - Programme for the International Assessment of Adult Competencies
- Policy Networks (EQF, EUROPASS, EUROGUIDANCE)
- National Erasmus Offices (NEOs)
- Social Inclusion and Common Values
- European policy network on teachers and school leaders
- European policy network in the field of education of children and young people with a migrant background
- Civil Society Cooperation in the field of Education and Training

d) Jean Monnet actions

- Jean Monnet Actions in the field of Higher Education: Chairs, Modules and Centres of Excellence
- Jean Monnet Policy Debate: Networks in the field of Higher Education and in other fields of education and training
- Jean Monnet in other fields of education and training: Teachers Training and Learning EU Initiatives

1.1.2 Youth

a) Key action 2: Cooperation among organisations and institutions

- Capacity building in the field of youth
- Partnerships for Cooperation in the field of Youth : European NGOs

b) Key action 3: Support to policy development and cooperation

- European Youth Together (Large and Small scale)
- EU Youth Dialogue: support to National Working Groups
- Civil society cooperation in the field of Youth

1.1.3 Sport

a) Key action 2: Cooperation among organisations and institutions

- Not-for-profit European sport events
- Small scale partnerships
- Cooperation partnerships
- Capacity Building in the field of Sport

b) Key action 3: Support to policy development and cooperation

- Dialogue with stakeholders - National Activities

The categories of eligible costs covered by the lump sum contribution are the following:

- a) Personnel costs,
- b) Travel and subsistence
- c) Subcontracting cost,
- d) Purchase costs,
- e) Other cost categories,
- f) Financing support to third parties
- g) Indirect cost

The amounts of the lump sum contributions to be used shall be calculated in accordance with point 3.

1.2 The Union contribution shall exclusively take the form of unit contributions for the following actions under the Erasmus+ Education and Training - Key action 2

- Partnerships for Excellence: Erasmus Mundus Joint Masters, including Erasmus Mundus Joint Masters – Additional scholarships for targeted regions of the world

The categories of eligible costs covered by the unit contributions are the following:

- a) Student scholarships to individuals covering travel and installation costs and subsistence costs,

- b) Institutional costs covering staff costs (teaching), staff travel costs, invited guest lecturers, promotion, dissemination, organisational costs (including insurance for the students, financial support to students special needs , assistance with accommodation, and other student services), administrative costs, and all other costs necessary to implement a successful master programme,
- c) Cost for special needs for the enrolled students

The amounts of the unit contribution to be used shall be calculated in accordance with point 3.

2 Justification

The use of lump sum and unit contribution will reduce the administrative burden and reduce the scope for error in the cost claims, will speed up the payment process and will ensure an effective risk control, while focusing on the quality of the results

The high number of actions and applications together with average amount of the grants justify the use of simplified cost options.

This system will facilitate a wider access to the grants as the rules for participation, implementation and reporting, are simpler and easier of understand for beneficiaries than the classical budget based mechanism. It provides legal certainty to the beneficiaries and ensures a better quality of the applications.

The diversity of actions and beneficiaries (profit making companies, public bodies, cultural associations, universities, designated bodies...) within this programme, makes the use of lump sum appropriate to facilitate the correct and complete implementation of the action.

The outputs of individual co-financed projects are tangible, qualifiable, and quantifiable (they include scholarships, trainings, traineeship for students, mobilities, lectures, events...).

Finally, the use of lump sum and unit contributions can reduce the administrative costs for participation in the programme and contribute to the prevention and reduction of financial errors (i.e staff cost calculations...). It also simplifies the calculation of grant amounts, while decreasing significantly the workload of both the beneficiaries and the granting authority (i.e complexity of verification of real costs through underlying supporting documents...). As a consequence, the payment procedures are accelerated

2.1 Nature of the supported actions

Erasmus+ is the EU Programme in the fields of education, training, youth and sport for the period 2021-2027. Education, training, youth and sport are key areas that support citizens in their personal and professional development. High quality, inclusive education and training, as well as informal and non-formal learning, ultimately equip young people and participant of all ages with the qualifications and skills needed for their meaningful participation in democratic society, intercultural understanding and successful transition in the labour market.

The Erasmus+ programme is subdivided in 3 key actions and Jean Monnet actions under Education and Training, Youth and Sport.

This Annex II part of the decision applies to centralised actions managed by the Agency

2.1.1 Key Action 2: Cooperation among organisations and institutions

The actions supported will bring positive and long-lasting effects on the participating organisations, on the policy systems in which such Actions are framed as well as on the organisations and persons directly or indirectly involved in the organised activities.

This Key Action is expected to result in the development, transfer and/or implementation of innovative practices at organisational, local, regional, national or European levels.

- strengthened cooperation between organisations and institutions active in the fields of education, training, youth and sport;
- development of innovative and inclusive approaches in addressing and reaching out to target groups of education, training, youth and sport policies;
- increased participation of individuals with fewer opportunities in education, training, youth and sport activities.
- increased digital capacity and readiness of organisations and institutions; a more strategic and integrated use of digital technologies and support for support digital transformation plans, open educational resources and open practices in education, training, youth and sport;
- more modern, dynamic, committed and professional environments inside the participating organisations: ready to integrate good practices and new methods into daily activities; open to synergies with organisations active in different fields or in other socio-economic sectors; strategic planning of professional development for staff in line with individual needs and organisational objectives;
- increased capacity of organisations and institutions to work and cooperate at EU/international level.
- improved sharing of good practices among organisations and institutions.

2.1.2 Key Action 3: Support for Policy Reform

Provides support to policy cooperation at European Union level, thereby contributing to the development of new policies, which can trigger modernisation and reforms, at European Union, and systems' level, in the fields of education, training youth and sport.

The actions implemented through Key Action 3 are intended to produce the main following results:

- improved quality, equity and inclusiveness education and training systems as well as youth and sport policies;
- higher degree of transnational cooperation and mutual learning between competent authorities and policy makers in the fields of education, training, youth and sport;
- increased knowledge and analytical capacity to support evidence-based policies in the fields of education, training, youth and sport;
- availability of sound comparative international data and appropriate secondary analyses for European and national policy making;
- improved tools for assessment, transparency and recognition of skills and qualifications acquired through formal, non-formal and informal learning;
- good functioning of European networks in charge of guidance and implementing tools that foster the transparency and recognition of skills and qualifications acquired through formal, non-formal and informal learning;
- active involvement of civil society networks and non-governmental organisations

in policy implementation;

- increased participation of young people and youth stakeholders in the EU Youth Dialogue;
- increased levels of participation of individuals in sport and physical activity
- higher degree of exchanges of good practices, dialogue, mutual learning and cooperation among policy makers, practitioners and stakeholders from Programme and Partner Countries;
- increased public awareness about European policies in the fields of education, training, youth and sport as well as increased awareness about the results of the Erasmus+ Programme;
- greater synergies with other EU Programmes, such as the European Structural and Investment Funds, as well as with funding schemes at national or regional level.

2.1.3 Jean Monnet

- a) Jean Monnet actions in the field of higher education enable higher education institutions inside and outside the EU to promote teaching and research on European integration and promote policy debate and exchanges involving the academic world and policy-makers on Union policy priorities. The following actions are supported:
 - Jean Monnet Modules: short teaching programmes in one or more disciplines of European Union studies;
 - Jean Monnet Chairs: longer teaching posts with a specialization in European Union studies for individual university professors, including Honorary Jean Monnet Chairs (without grant);
 - Jean Monnet Centres of Excellence: focal points gathering knowledge of high-level experts in various disciplines of European studies, as well as developing transnational activities and structural links with academic institutions in other countries;
- b) Jean Monnet actions in other fields of education and training supports learning about the objectives and the functioning of the European Union and promotes active citizenship and the common values of freedom, tolerance and non-discrimination institutions in other fields of education. The following actions are supported:
 - Jean Monnet Teacher Training: enables teachers in schools to develop new skills and to teach and engage on EU matters, thus empowering them through a better understanding of the EU and its functioning. It will offer opportunities to education providers to develop content (teaching and training modules, materials for teachers and trainers, etc.) and innovative tools as well as to carry out activities within education and training institutions, to raise awareness and exchange views about the European Union matters and subject studies;
 - Jean Monnet Learning EU Initiatives: addresses schools and VET institutions the current widespread lack of knowledge of the EU, its basic functioning and objectives by promoting critical awareness of the EU. They will help young Europeans become active and informed citizens, engaged in the democratic processes that shape their future and that of the EU. The Learning EU initiatives will enable teachers in schools and VET institutions to develop activities bringing facts and knowledge on the European Union to a broad spectrum of learners, also

reaching out to their community (parents and families, local actors and authorities).

c) Jean Monnet policy debate

- Jean Monnet networks in Higher Education: have as primary objective to collect, share and discuss among the partners research findings, content of courses and experiences, products (studies, articles, etc.).
- Jean Monnet networks in other fields of education: promotes an international aspect to school education and exchange of good practices and co-teaching within a group of countries. It will promote a common understanding on learning methodologies relevant to EU issues among practitioners working under different constraints such as differing national legislations and curricula structures.

2.2 Risks of irregularities and fraud and costs of control

The use of lump sum and unit contributions is essential for the actions where activities and outputs are evaluated and approved by an ex-ante evaluation, based in objective and reliable information (historical, statistical data...).

The risk of errors or irregularities is lower than when using real costs because there is no reporting of actual costs. Moreover, beneficiaries have no obligation to provide documents to the granting authority on the costs incurred. Notwithstanding this, they remain subject to applicable accounting rules and the specific eligibility rules of the programme.

The lump sum and unit contributions are output-based, meaning the main condition for payment is achievement of the pre-defined outputs. In terms of control, the granting authority will undertake checks at the time of preparation of the grant, during the implementation of the action and at the completion of the actions (through reports from funded projects, checks on milestones and deliverables, reviews and/or audits).

The risk of fraud and the cost of controls of the triggering event, for the lump sum or unit cost payment, are limited, since the proper implementation of the action is clearly defined and output-based. If the conditions for payment of the lump sum or unit cost have not been met, (e.g. a particular work package has not been completed or not as defined), or if the action that entitles the unit cost has not been carried out (e.g. not travel made, not scholarship implemented) and an undue payment was made to a beneficiary, those costs will become ineligible and the granting authority will be entitled to reduce the grant and consequently recover the undue paid amounts. All of this can be verified in the context of the granting authority's control and anti-fraud strategy, (AFS)²¹ that together with a long experience of controlling simplified cost options will ensure a reasonable level of assurance,.

3 Method to determine the amount of the Union contribution in the form of lump sum contributions

3.1 Method to determine the amount of the Union contribution in the form of lump sums contributions for the following actions:

- Not-for-profit European sport events,
- Dialogue with stakeholders - National Activities,

²¹ The EACEA Anti-Fraud Strategy (AFS) and its related action plan 2018-2020 were adopted on 9 July 2018 by the Steering Committee and approved by the college on 29 April 2019

- Jean Monnet Modules and Chairs,
- Jean Monnet Learning EU Initiative,
- Erasmus Mundus Joint Master Design Measures,
- Sport - Small scale partnerships,
- Sport - Cooperation partnerships,
- European NGOs Partnerships for cooperation in the field of Education and Training and in the field of Youth
- Civil Society Cooperation in the field Education and Training and in the field of Youth

3.1.1 Not-for-profit European sport events

3.1.1.1 Nature of the supported actions

This action will support the preparation, organisation and follow up of not-for-profit sport events, organised either in one single country or in several countries by not-for-profit organisations or public bodies active in the field of sport.

The EU grant covers the following activities (non-exhaustive list): preparation and organisation of the event, organisation of educational activities for athletes, coaches, organisers and volunteers in the run-up to the event; organisation of side-activities to the sporting event (conferences, seminars); training of volunteers; implementation of legacy activities (evaluations, drafting of future plans); communication activities linked to the topic of the event.

3.1.1.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

Each year the Agency receives 80-100 applications under this action with a result of 11 to 18 grants agreement signed.

The calculation of the lump sum contributions is determined based on an internal expert judgement based on historical data of the total reimbursed cost of the financed projects.

A sample of 27 financed projects of 2016/2018 of the previous MMF (2014-2020), were pre-selected for this analysis.

From this 27 financed projects we took out 4 projects with an average funding of 57 000, and 3 projects above 1 000 000 EUR that would be financed during the period 2021-2027 via another funding mechanism.

Of the 20 projects (representing 70% of the total number of financed projects) covering 2 years of calls, the analysis identifies two types of events with clear different categories of costs:

- i. European local events where national events were replicated/organised in different countries (e.g. Special Olympic football) event across 21 countries.
- ii. European wide events in one programme country: one major event organised with the participation of organisations from at least 10 different countries (e.g. opening of the Women World Football cup in Copenhagen).

These two types of events have specific characteristics in terms of funding:

i. The European wide events were awarded a Union contribution ranging between 400 000 and 500 000 EUR and while European local events were awarded a Union contribution between 200 000 and 300 000 EUR.

The correlation of the grant awarded with the number of events being higher than the one with the number of countries (0,93 vs 0,63) it was decided to use the former as parameter to generate the lump sum.

ii. For European local event actions, each event must be held in each of the Programme countries of the participating organizations. The grant requested will correspond to the amount assigned to the number of participating events/organisations .

Based on the data at hand, a distinction should also be made between events replicated in less than 6 countries, and larger scale replication (from 6 territories).

- actions involving a minimum of 3 organisations coming from 3 different Programme countries to a maximum of 5 organisations coming from 5 different Programme countries could request 200 000 EUR

- actions involving a minimum of 6 organisations coming from 6 different Programme Countries could request 300 000 EUR

Simulations of these lump sums show that it would entail a global funding reduction of ~5%. It can therefore be accepted as a reliable proxy of the actual cost.

The European wide event, are mono event with at least the participation of 10 organisations from 10 different Programme countries. The activities must take place in the Programme country of the applicant organisation involved.

The strand proposed will be set one event organised and the corresponding action will involve 10 or more countries at 450 000 EUR

The final payment will correspond to the completed work packages, with the limit established in the maximum grant amount set in the grant agreement, and, without prejudice to the application of the articles specifically related to payment conditions and grant reduction.

Simulations of this lump sum applied to actions implemented in the past show that it would entail a global funding reduction of ~4%. It can therefore be accepted as a reliable proxy of the actual cost.

| i. European local events | |
|---------------------------------|-------------|
| Number events | Funding |
| 3 to 5 | 200 000 EUR |
| >or = 6 | 300 000 EUR |

| ii. European wide events | |
|---------------------------------|-------------|
| Number countries | Funding |
| >or = 10 | 450 000 EUR |

3.1.2 Dialogue with stakeholders - National Activities

3.1.2.1 Nature of the supported actions

The European Week of Sport initiative is part of an overall policy aiming at increasing the level of participation in sport and physical activity in the EU. The main objective of the action is to help to ensure that the European Week of Sport initiative is implemented and gets visibility in the participating countries and that the messages of the Week reaches out to as many Europeans as possible and encourages them to be active. To this end, the competent ministries of each Member State appoints each organizing entities, National Coordinating Bodies (NCB) that will perform three main tasks:

- i. Event(s) organisation: each National Coordinating Body (NCB) must organise at least one national event in their country, preferably during the European Week of Sport (23-30 Sept.);
- ii. Coordination: Ensure close links with national key players (e.g. National Olympic Committees, sport federations and confederations, education institutions and schools, etc.) who can play a role for the action before, during and after the European Week of Sport;
- iii. Communication: Ensure visibility for the European Week of Sport through national and European campaigns.

The outputs are the sport events themselves and the communication campaign(s) with the #BeActive message “let’s do sport”, as well as the network of stakeholders.

3.1.2.2 Method to determine and update the amount of the Union contribution in the form of lump sum contributions

a) Data sources and sample

This action began in 2015 and since then has been modified and adapted to the needs of the action. The level of funding has varied as more activities have been added and more needs have been met. Therefore, the data selected was obtained from the latest implemented projects; 32 grant agreements signed in 2018 for actions implemented up to 2019.

For the following analysis we have considered the EU grant awarded after the co-financing rate of 80% was applied .

b) Analysis

Most actions are concentrated between 150 000 and 200 000 EUR, with an average of 176 000 EUR.

Simulations have been carried out to verify the effect on the actual funding levels of applying a number of amounts :

- an amount of 150 000 EUR results in an overall reduction in funding of 13,5%;
- an amount of 160 000 EUR results in an overall reduction in funding 8,3%;
- an amount above 160 000 EUR, although diminishing this funding gap, results in overfunding of some smaller project by up to 14% (for 165 000 EUR) or to 18% (170 000 EUR) in some regions.

Based on this, and in order to ensure the principle of co-financing, the lump sum contribution for this action is set at 160 000 EUR.

3.1.3 Jean Monnet Modules and Chairs

3.1.3.1 Nature of the supported actions

This action has used simplified cost options since 2010 and therefore the beneficiaries are familiar with these methodologies. The new lump sums will be based on the previously used unit costs and flat rates and will further simplify the implementation of the action.

- Jean Monnet Chair - a teaching post with a specialisation in European Union studies for university professors or senior lectures. Only one professor may hold the Chair and must provide a minimum number of teaching hours per academic year.
- Jean Monnet Module - a short teaching programme (or course) in the field of European Union studies at a Higher Education Institution. Each Module has a minimum duration of teaching hours per academic year. Modules may concentrate on one particular discipline in European studies or be multidisciplinary in approach and therefore call upon the services of several professors and experts.

A significant added value of this system is the possibility to differentiate the lump sum to correspond to countries with similar teaching hour costs. This methodology will allow the granting authority to differentiate the maximum amount of the grant according to the country of each applicant and the teaching hours that they have declared in the application.

Moreover, simulations have shown that the proposed methodologies result in similar amounts to the current use of flat rates and unit costs, which ensures that the grants remain attractive while respecting sound financial management

3.1.3.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

a) Data sources

The simplified funding model for the Lifelong Learning Programme Jean Monnet was established after a study carried out by EACEA and approved for the previous MMF period 2014-2020.

For the purposes of this new methodology, historical data from Jean Monnet Chairs and Modules selected between 2014 and 2020 was extracted.

b) Sample

Data was extracted from the final activity reports of 203 projects from a population of 299 financed projects, specifically, 142 out of 227 for Jean Monnet Chair and 61 out of 72 for Jean Monnet Modules.

c) Analysis

The lump sum has been estimated using the following information :

Unit cost for teaching costs per country approved in the previous MMF²², where the minimum hourly teaching cost was set at 80 EUR and the maximum at 200 EUR. The Jean Monnet Programme is open to participants and beneficiaries from all over the world. Country teaching rate: is a flat rate for costs not associated with the preparation and delivery of teaching programme (10% for a Chair and 40% of a Module) including non-

²² The system was introduced for these project types under the 2010 Call for proposals following the European Commission's approval of the 2010 EAC Annual Work Programme (C(2009)7734) of 7 October 2009 and C(2013)8550 of 4 December 2013

teaching staff costs (for assistants, administrative staff, etc.), travel and subsistence costs, dissemination costs, interpretation costs and other costs linked to event organisation, teaching materials, etc. This top-up enables the beneficiary to implement the action properly.

- The country teaching rate: flat rates of 10% and 40% are calculated as percentages of the national teaching costs;
- The top-up percentage is higher for Module as more additional (accompanying) activities are organised, and, several teachers/professors are involved in the delivery of the teaching programme, whereas for a Jean Monnet Chair only one staff member is responsible for the delivery of the entire teaching programme;

In both cases, for the Module and the Chair, the top-up percentages have been set to reflect the real costs typically incurred for each type of activity over the lifetime of the programme and as such are based on actual expenditure.

The final payment will correspond to the hours finally implemented, with the limit established in the maximum grant amount set in the grant agreement and without prejudice to the application of the grant reduction articles in this regard.

In addition, using this lump sum the risk of irregularity on adding teaching hours without a maximum limit is limited.

- **Methodology for Jean Monnet Chairs**

From a population of 227 financed projects belonging to the 2014-2020 MFF, a selection of 142 projects has been made through the following steps:

- a) The following formula has been applied: Total number of teaching hours for a 3 years period* country teaching rate (110%) *75% co-financing;
- b) After a screening of these projects, the non-compliant projects with the 100% teaching rate (not 100% match between grant awarded and ex-post checked) were removed;
- c) In order to focus on countries having a specific teaching cost amount, projects from “Other countries” were taken out of the sample.

Applying these parameters, a population of 142 projects is obtained amounting to EUR 6 624 898, covering actions from Programme and Partner countries

75% of the population is within the range 270-450 hours for teaching hours over the 3 year period.

Using these results, a reference grid has been developed establishing different tranches with the ratios of teaching hours and groups of countries (see Tables 1 and 2 below). The starting point has been set to 270 hours (minimum requested hours) and it is increased by 30 hours for each tranche with a maximum amount of the grant set at 50 000 EUR. The beneficiary will request the amount corresponding to the number of hours they intend to teach over the 3 year period. If at the final payment, those hours are not delivered, the amount of the grant will be reduced to the amount corresponding to the tranche below, and without prejudice to the grant reduction articles set in the grant agreement. The maximum grant amount set in the grant agreement may not be exceeded.

The countries have been distributed into the groups based on their similar teaching costs. The application of the grid amounts ensures the best proxy to the reality of each action and country, and the rule of non-profit is ensured.

The tranches are designed covering the 100% of the analysed population.

In order to avoid the disparities in the reported working hours from the former financing scheme, where no upper limit on teaching hours was fixed, this lump sum scheme will set an equitable distribution system between the different countries, where everyone has the opportunity to reach the maximum lump sum contribution of 50 000 EUR.

Financial result of the simulation with this method: new budget within error margin (<1%): 6.597.00 vs 6.624.898 EUR.

- **Methodology for Jean Monnet Modules**

From a population of 72 financed projects belonging to the 2014-2020 MFF, a selection of 61 projects has been made through the following steps:

- a) The following formula has been applied: Total number of teaching hours for a 3 years period* country teaching rate* (140%) *75% co-financing;
- b) After a screening of these projects, the non-compliant projects with the 100% teaching rate (not 100% match between grant awarded and ex-post checked) were removed.

Applying these parameters gives a population of 61 projects amounting to EUR 1 544 867, covering actions from Programme and Partner countries.

75% of the population is within the range 120-240 hours for the teaching hours over a 3 year period.

Following this, a reference grid has been developed establishing different tranches with the ratios of teaching hours and groups of countries (see Tables 3 and 4 below). The starting point has been set to 120 hours (minimum numero of hours required) and it is increased by 30 hours for each tranche with a maximum amount of the grant set at 30 000 EUR. The beneficiary will request the amount corresponding to the number of hours they intend to teach over the 3 year period. If at the final payment, those hours are not delivered, the maximum amount of the grant will be reduced to the amount corresponding to the tranche below and without prejudice to the grant reduction articles set in the grant agreement. The maximum grant amount set in the grant agreement may not be exceeded.

The countries have been distributed into the groups based on their similar teaching costs. The application of the grid amounts ensures the best proxy to the reality of each action and country and the rule of non-profit is ensured.

The tranches are designed to cover the 100% of the analysed population.

In order to avoid the disparities in the reported working hours from the former financing scheme, where no upper limit on teaching hours was fixed, this lump sum scheme will set an equitable distribution system between the different countries, where everyone has the opportunity to reach the maximum lump sum contribution of 30 000 EUR

Financial result of the simulation with this method: new budget within error margin <1%: 1 547 000EUR (vs 1 544 867 EUR).

Table 1: Lump sum for Jean Monnet Chair for Programme countries

| COUNTRY | Teaching hours over the 3 years period (Min 90/Year) | | | | | | | | | | | | | | | | |
|---|--|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|----------|
| | 270 - 300 | 301 - 330 | 331 - 360 | 361 - 390 | 391 - 420 | 421 - 450 | 451 - 480 | 481 - 510 | 511 - 540 | 541 - 570 | 571 - 600 | 601 - 630 | 631 - 660 | 661 - 690 | 691 - 720 | 721 - 750 | > 750 |
| Bulgaria, Romania Republic of North Macedonia Liechtenstein Serbia | 18.000 € | 20.000 € | 22.000 € | 24.000 € | 26.000 € | 28.000 € | 30.000 € | 32.000 € | 34.000 € | 36.000 € | 38.000 € | 40.000 € | 42.000 € | 44.000 € | 46.000 € | 48.000 € | 50.000 € |
| Turkey Croatia Latvia | 19.000 € | 21.000 € | 23.000 € | 25.000 € | 27.000 € | 29.000 € | 31.000 € | 33.000 € | 35.000 € | 37.000 € | 39.000 € | 41.000 € | 43.000 € | 45.000 € | 47.000 € | 49.000 € | 50.000 € |
| Hungary Poland Lithuania Czech Republic Estonia Slovakia | 25.000 € | 28.000 € | 31.000 € | 34.000 € | 37.000 € | 40.000 € | 43.000 € | 46.000 € | 49.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € |
| Portugal Greece Slovenia Malta | 31.000 € | 34.000 € | 37.000 € | 40.000 € | 43.000 € | 46.000 € | 49.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € |
| Cyprus Iceland Spain Italy | 37.000 € | 41.000 € | 45.000 € | 49.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € |
| Ireland France Finland | 43.000 € | 47.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € |
| Belgium Denmark Germany Luxembourg Netherlands Austria Sweden Norway | 47.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € |

Table 2 Lump sum for Jean Monnet Chair for Partner Countries

| | Teaching hours over the 3 years period (Min 90/Year) | | | | | | | | | | | | | | | | |
|--|--|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|----------|
| | 270 - 300 | 301 - 330 | 331 - 360 | 361 - 390 | 391 - 420 | 421 - 450 | 451 - 480 | 481 - 510 | 511 - 540 | 541 - 570 | 571 - 600 | 601 - 630 | 631 - 660 | 661 - 690 | 691 - 720 | 721 - 750 | > 750 |
| | | | | | | | | | | | | | | | | | |
| Partner Countries | | | | | | | | | | | | | | | | | |
| Chile Saint Kitts and Nevis Mexico Libya Antigua and Barbuda Barbados Other countries | 21.000 € | 23.000 € | 25.000 € | 27.000 € | 29.000 € | 31.000 € | 33.000 € | 35.000 € | 37.000 € | 39.000 € | 41.000 € | 43.000 € | 45.000 € | 47.000 € | 49.000 € | 50.000 € | 50.000 € |
| Territory of Russia as recognis Bahrain Trinidad and Tobago | 24.000 € | 27.000 € | 30.000 € | 33.000 € | 36.000 € | 39.000 € | 42.000 € | 45.000 € | 48.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € |
| Saudi Arabia Seychelles Equatorial Guinea Oman Israel | 31.000 € | 34.000 € | 37.000 € | 40.000 € | 43.000 € | 46.000 € | 49.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € |
| Korea, Republic of New-Zealand | 37.000 € | 41.000 € | 45.000 € | 49.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € |
| Japan United Kingdom | 43.000 € | 47.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € |
| Brunei Canada Hong Kong Kuwait Qatar Singapore Switzerland United Arab Emirates United States of America | 47.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € | 50.000 € |

The series of simulations performed has shown that the difference between the total grant paid for all projects from the previous financing system and the new lump sum system is lower to 1% .The average amount of the tranches already embeded the impact of the inflation for the period.

Table 3 Lump sum for Jean Monnet Modules for Programme countries

| COUNTRY | Teaching hours over the 3 years period (Min 40/Year) | | | | | | | |
|---|--|----------|----------|----------|----------|----------|----------|----------|
| | 120-150 | 151-180 | 181-210 | 211-240 | 241-270 | 271-300 | 301-330 | 331-360 |
| Bulgaria, Romania Republic of North Macedonia Liechtenstein Serbia | 11.500 € | 14.000 € | 16.500 € | 19.000 € | 21.500 € | 24.000 € | 26.500 € | 30.000 € |
| Turkey Croatia Latvia | 13.500 € | 16.500 € | 19.500 € | 22.500 € | 25.500 € | 28.500 € | 30.000 € | 30.000 € |
| Hungary Poland Lithuania Czech Republic Estonia Slovakia | 15.000 € | 18.500 € | 22.000 € | 25.500 € | 29.000 € | 30.000 € | 30.000 € | 30.000 € |
| Portugal Greece Slovenia Malta | 19.000 € | 23.000 € | 27.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € |
| Cyprus Iceland Spain Italy | 22.000 € | 27.500 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € |
| Ireland France Finland | 26.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € |
| Belgium Denmark Germany Luxembourg Netherlands Austria Sweden Norway | 28.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € |

Table 4 Lump sum for Jean Monnet Modules for Partner countries

| | Teaching hours over the 3 years period (Min 40/Year) | | | | | | | |
|---|--|----------|----------|----------|----------|----------|----------|----------|
| | 120-150 | 151-180 | 181-210 | 211-240 | 241-270 | 271-300 | 301-330 | 331-360 |
| Partner Countries | | | | | | | | |
| Chile Saint Kitts and Nevis Mexico Libya Antigua and Barbuda Barbados Other countries | 11.500 € | 14.000 € | 16.500 € | 19.000 € | 21.500 € | 24.000 € | 26.500 € | 30.000 € |
| Territory of Russia as recognised by international law, Bahrain, Trinidad and Tobago | 15.000 € | 18.500 € | 22.000 € | 25.500 € | 29.000 € | 30.000 € | 30.000 € | 30.000 € |
| Saudi Arabia Seychelles Equatorial Guinea Oman Israel | 19.000 € | 23.000 € | 27.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € |
| Korea, Republic of New-Zealand | 22.000 € | 27.500 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € |
| Japan United Kingdom | 26.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € |
| Australia Brunei Canada Hong Kong Kuwait Qatar Singapore Switzerland United Arab Emirates United States of America | 28.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € | 30.000 € |

3.1.4 Jean Monnet Learning EU Initiatives

3.1.4.1 Nature of the action

The Jean Monnet Learning EU Initiatives is a short teaching programme (or course) in the field of European Union studies at schools or VET providers at level ISCED 1-4. Each Learning EU initiative action has a minimum duration of 40 teaching hours per school year over 3 years period. The Jean Monnet Learning EU Initiatives action concentrates on the creation of experiences with a focus on learning outcomes about the European Union and its policies for pupils in both primary or secondary schools. Schools will create the learning content and must provide a minimum number of learning hours per school year. Learning EU Initiatives cover only programme countries.

This action follows a lump sum funding model for grants. This funding scheme will allow putting the focus on the outputs rather than the inputs, thereby placing emphasis on the quality and level of achievement of measurable objectives.

A significant added value of this model is the possibility to differentiate the lump sum according to groups of countries with similar teaching hour costs. Doing so will allow the granting authority to differentiate the maximum amount of the grant according to the country of each applicant.

This action is a mirror action of Jean Monnet Modules²³ but with different actors. Jean Monnet Modules are developed by Higher Education Institutions while Jean Monnet Learning EU initiatives is to be developed by schools and VET providers at level ISCED 1-4.

Jean Monnet Modules have been implemented with simplified cost options since 2010. For the new MFF 2021_2027, a new simplified cost – based on a lump sum approach- was developed (see 3.1.3).

The amounts of the grants for each tranche have been set according to the country of the applicants, which are grouped by similar standards of living. It ensures that the grants remain attractive while respecting sound financial management. In addition, using this lump sum the risk of irregularity on adding teaching hours without a maximum limit is limited.

3.1.4.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

Learning EU initiatives is built on the existing methodology for Jean Monnet Modules, which is developed based on two factors: a) the unit value of teaching hours per country and b) the flat rate for additional costs not associated with the preparation and delivery of teaching programs.

As a basis:

- Minimum of learning hours is set at 40 hours per year over a 3-year period, exactly like for Jean Monnet Modules;
- Five tranches of learning hours have been established over a 3-year period while for Jean Monnet Modules there are eight tranches;

²³ Jean Monnet Module being a short teaching program (or course) in the field of European Union studies at a Higher Education Institution. Each Module has a minimum duration of teaching hours per academic year. Modules may concentrate on one particular discipline in European studies or be multidisciplinary in approach and therefore call upon the services of several professors and experts.

- The grouping of countries, having a similar living cost, is the same as for Jean Monnet Modules;
- The value of teaching hours was established based on historical data in projects showing the actual remuneration of professors within the same group of countries;
- A correction of 15 % was applied due to the difference in salaries between academic staff and teachers;
- A 40% flat rate was applied as a top-up for costs that are not associated with the preparation and delivery of teaching programs, such as non-teaching staff costs (for assistants, administrative staff, etc.), travel and subsistence costs, dissemination costs, interpretation costs and other costs linked to event organization, teaching materials, etc., - like for Jean Monnet Modules.

- Unit value of teaching hours

For Jean Monnet Modules, the unit value of teaching was built on the basis of unit cost for teaching costs per country from historical project data.

For Jean Monnet Learning EU Initiatives, a difference of 15% has been applied to reflect a salary difference between academic staff and teachers in school.

This was based on the following elements:

- ISCED 1-4 covers schools while ISCED 6-7-8 covers universities.
- There are only data for 9 European countries.
- The teachers' salaries are taken from Eurydice study « Teachers' and School Heads' Salaries and Allowances in Europe 2018/19» and, more specifically, on page 25 Figure 7: Average annual gross actual salaries (EUR) of teachers aged 25-64 in public schools, 2018/19.
- Information about remuneration of professors was taken from pages 75-76 in Eurydice study «Modernisation of Higher Education in Europe: Academic staff - 2017 ». This is based on surveys including self-reported pay.

| | ISCED 6-7-8 Professor Senior staff | ISCED 6-7-8 Professor Junior staff | ISCED 1 Teacher | ISCED 2 Teacher | ISCED 3-4 Teacher | Average |
|-------------|--|--|--------------------|--------------------|----------------------|---------------|
| Germany | 66.500 | 39.900 | 58.847 | 64.599 | 69.457 | 64.301 |
| Portugal | 66.500 | 39.900 | 29.561 | 32.291 | 31.573 | 31.142 |
| Netherlands | 66.500 | 39.900 | 51.148 | 61.996 | 61.996 | 58.380 |
| Austria | 66.500 | 39.900 | 50.764 | 58.322 | 65.347 | 58.144 |
| Italy | 47.500 | 28.500 | 29.494 | 31.631 | 33.796 | 31.640 |
| Finland | 47.500 | 28.500 | 44.408 | 49.303 | 55.731 | 49.814 |
| Norway | 47.500 | 28.500 | 56.089 | 56.089 | 60.754 | 57.644 |
| UK | 47.500 | 28.500 | 39.577 | 39.577 | 44.198 | 41.117 |
| Poland | 30.000 | 18.000 | 14.284 | 14.517 | 14.178 | 14.326 |
| | 54.000 | 32.400 | 41.575 | 45.369 | 48.559 | 45.168 |
| | | | 77% | 84% | 90% | 84% |

Based on the above analysis, the average teacher's remuneration for these countries is about 84% of the average remuneration of senior staff at university.

Staff at universities progress rapidly to higher pay scales whereas they can have about 10% income from other sources. Assuming 70% at senior staff at university times €54,000 and 30% at junior staff level at university times €32,400 multiplied by 1,10 for other compensation, the end result indicates again a ratio of about 84% between the average teacher salary of €45,168 in these 9 countries and the average remuneration of senior staff at university.

Therefore, this analysis reflects that school teachers' salaries are about 15% lower than academic staff.

- The flat rate for costs not associated with the preparation and delivery of teaching programs

The lump sum includes a flat rate for costs not associated with the preparation and delivery of teaching programs. Learning EU initiatives is the same action than a Jean Monnet Module. Therefore, the flat rate covers exactly the same activities including the non-teaching staff costs (for assistants, administrative staff, etc.), travel and subsistence costs, dissemination costs, interpretation costs and other costs linked to event organisation, teaching materials, etc.

Consequently, the flat rate proposed for EU learning initiatives will re-use the 40 % top up used in Jean Monnet Modules.

In summary, the following formula has been applied: "Total number of teaching hours for a 3 years period* country teaching rate from Jean Monnet modules country teaching rate*(85% to reflect salary difference between university staff and school teachers * (140%) top-up *80% co-financing"

This gives the following end result for the lump sums:

| Learning EU initiatives | | | | | |
|--|------------------|------------------|------------------|------------------|------------------|
| Groups of countries²⁴ | Tranche 1 | Tranche 2 | Tranche 3 | Tranche 4 | Tranche 5 |
| | 120-150 | 151-180 | 181-210 | 211-240 | ≥241 |
| Bulgaria, Romania, Republic of North Macedonia, Liechtenstein, Serbia | 10.250 | 12.500 | 14.750 | 17.000 | 19.250 |
| Turkey, Croatia, Latvia | 12.000 | 14.750 | 17.500 | 20.000 | 22.750 |

²⁴ If new countries will join the program, their participation would be included in the same group of living conditions as the one established for Jean Monnet Modules

| | | | | | |
|--|--------|--------|--------|--------|--------|
| Hungary, Poland, Lithuania, Czech Republic, Estonia, Slovakia | 13.500 | 16.500 | 19.750 | 22.750 | 26.000 |
| Portugal, Greece, Slovenia, Malta | 17.000 | 20.500 | 24.000 | 27.750 | 30.000 |
| Cyprus, Iceland, Spain, Italy | 19.750 | 24.500 | 29.000 | 30.000 | 30.000 |
| Ireland, France, Finland | 23.250 | 28.500 | 30.000 | 30.000 | 30.000 |
| Belgium, Denmark, Germany, Luxembourg, Netherlands, Austria, Sweden, Norway | 25.000 | 30.000 | 30.000 | 30.000 | 30.000 |

3.1.5 Erasmus Mundus Joint Master -Design Measures

3.1.5.1 Nature of the action

The Erasmus Mundus Joint Master Design Measures (EMJM-DM) is a new independent action aiming to facilitate the setting up of new joint master programmes in the framework of new partnerships and to involve Erasmus Mundus underrepresented regions, institutions and thematic areas.

3.1.5.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

Under the former Erasmus+ Programme, there were no design / accompanying measures linked to the Erasmus Mundus Joint Master Degrees. In this sense, the EMJM – Design Action is a new initiative. However, similar actions (‘accompanying measures’) have been running under the earlier funding generation (2007-2013).

- The grants awarded (based on real costs) under the Lifelong Learning Programme – Accompanying Measures Erasmus action (2007 – 2013, LLP-AM) have been taken as reference action for the following reasons: Similar target field (higher education) and beneficiaries (mainly higher education institutions);
- Similar objectives, namely contributing to the modernisation agenda of Higher Education and enhancing the implementation of Erasmus Mobility. The LLP-AM Erasmus gathered different European higher education institutions (HEIs) into small consortia (consortium size between 2 to 25 partners) to discuss cooperation on concrete topics in an academic setting²⁵;
- Comparable duration of the agreement (12 to 18 months);
- Same range of eligible activities and related cost items. Both actions consider as eligible academic staff costs (for preparation time and course revisions),

²⁵ LLP-Accompanying Measures: https://eacea.ec.europa.eu/sites/2007-2013/lifelong-learning-programme_en

international travels (to consortium meetings, e.g.), small equipment (promotion material), subcontracting (experts, website designer, ad hoc studies) and indirect costs.

As for the EMJM-DM, in the LLP-AM, beneficiaries were expected to identify a number of work packages, to which they could allocate different costs. An analysis of the (real) costs reported by the 45 beneficiaries shows a large variation between the costs reported (see last column of the table below). This variation reflects the different needs and situation of the partner institutions and is expected to be comparable for the EMDM.

Indeed, some consortia may already have had a prior (research, teaching) cooperation or may be already advanced in some aspects of their cooperation (e.g. curriculum development). Therefore, they need to have the flexibility to focus on specific topics, which may generate different costs.

In the table below, an overview of all 45 projects grants (funded between 2007 and 2013 under LLP-AM) per cost category is provided, on the basis of which the average grant amount per project was calculated.

| | Total paid LLP-AM- Erasmus (€, 45 projects) | Average grant contribution per project (€) | Range (€, minimum and maximum across 45 projects) |
|------------------------------|--|---|--|
| Staff costs | 3 223 769 | 71 639 | 22 000 to 123 200 |
| Travel and subsistence costs | 894 110 | 19 869 | 0 to 63 188 |
| Equipment | 7 254 | 161 | 0 to 1 185 |
| Subcontracting | 357 036 | 7 934 | 0 to 34 494 |
| Other costs | 1 120 736 | 24 905 | 0 to 81 485 |
| Indirect costs | 317 731 | 7 061 | 0 to 9 813 |
| Total | 5 920 635 | 131 570 | 70 000 to 150 000 |

The average grant amount per project for the LLP-AM Erasmus was thus € 131 570, whereby the Union grant contribution covered maximum 75% of the total eligible costs. The actual total costs for one LLP-AM project can be estimated at € 175.427.

Furthermore, an indexation of 6.77%²⁶ is applied in order to adapt the costs to the current price levels, which leads to an average cost of € 187.303 per project.

The EMJM-DM action is intended as an incentive to further cooperation and internationalization, but not as a full-fledged funding scheme of these activities. The aim is to cover specific activities related to the preparation of a joint programme, but it can be reasonably expected of the higher education institutions involved to co-finance most of the

²⁶ Eurostat, Harmonized Consumer Price Index for EU-27, 2015 = 100; whereby 2013 MTH1 = 98.34 and 2020 MTH5 = 105.00; <https://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>

activity cost. This applies in particular to the staff costs, comprising also regular academic tasks related to e.g. curricular activities, developing student monitoring mechanisms and joint teaching approaches. Moreover the agreement of the institutions to cover a substantial part of the costs will be a sign of their commitment and therefore a guarantee for the long term sustainability of the endeavor.

The Union contribution to the grant will therefore be set at 55.000 EUR per project, which is a funding rate of 29.36 %.

| Erasmus Mundus Joint Master Design Measures | |
|---|--------|
| LUMP SUM | 55.000 |

3.1.6 Sport - Small scale partnerships

The nature of this action and the method to determine and update the amount of Union contribution are the same as in paragraph [3.2.2](#) under Annex 1 above, with the only difference that the action is managed directly by EACEA.

3.1.7 Cooperation partnerships in the fields of sport, Education and Training, Youth (European NGOs)

3.1.7.1 Nature of the action

This is the part managed by EACEA of the action Cooperation partnerships, described under paragraph [3.2.1](#) in Annex 1 above.

The primary goal of this action is to allow organisations and institutions to increase the quality and relevance of their activities and/or develop and reinforce their networks of partners, thus increasing their capacity to operate jointly at transnational and international level, boosting internationalisation of their activities, exchanging new practices and methods, as well as sharing and confronting ideas.

3.1.7.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

The nature of this action and the method to determine and update the amount of Union contribution are the same as in paragraph [3.2.1](#) under Annex 1 above, with the only difference that the action is managed directly by EACEA.

3.1.8 Civil Society Cooperation in the field Education and Training and in the field of Youth

3.1.8.1 Nature of the action

The Civil Society Cooperation (CSC) actions in the fields of Education and Training (E&T), and in Youth are operating grants for organisations working in the areas specified. The objective of the action is to support the functioning of these organisations. These organisations aim at facilitating cross-country cooperation to promote knowledge and policy transfers for learning and supporting EU objectives and priorities among the relevant stakeholders as well as relay their views to the Commission.

The CSC action provides structural support to 2 categories of stakeholders in the fields of Youth and E&T:

- European non-governmental organisations (ENGOS);
- EU-wide networks (formal for E&T; informal for Youth)

The Civil Society Cooperation actions existed in both the 2007-2013 and the 2014-2020 Erasmus+ programmes. In 2014-2020, the funding model was unit cost based with two unit costs defined (staff costs and statutory meetings)²⁷. This model facilitated the execution of the grants for the stakeholders because of their simple set-up and support of essential functions within the organisations. A move to lump sum funding model for future operating grants would simplify even more the applicants' and beneficiaries' project management: the previous use of unit costs entailed extra calculation for the final grant (number of staff and number of meetings). The new lump sum model will be based mainly on staff costs and would simplify the implementation of the action by reducing the administrative burden of the recipients which are largely small sized organisations doing work directly with education and training, and youth target populations. As a knock-on effect, it would also simplify the reporting and payment analysis for the EU services allowing a faster delivery of grant for the benefit of the stakeholders.

3.1.8.2 Method to determine and update the amount of the Union contribution in the form of lump sums contributions

The main cost category of organisations working on civil society cooperation is 'staff costs' as confirmed by the real cost data supplied for the 2022 CSC selection funded with budget-based model. Data collection at reporting and submission stage shows that staff costs make up between 65 and 80% of total costs. The remaining costs are to be classified as 'other eligible costs' (subcontracting, travel and subsistence, equipment and other goods, works and services). In order to cover the main driver of eligible costs, and in order to ensure respect of sound financial management, the lump sum funding will be essentially based on 'staff costs'.

The data used in order to determine the lump sum was collected from final reports of projects selected in 2020 (ENGOS and EU-wide Networks). Even though the action was funded with unit costs, the final reports provided documentation on real staff costs incurred (payslips of staff in education, training and youth organisations). In addition, the reports provided data on number of employees per organisation.

The analysis of data reveals that there is a wide spread in salary levels. The average yearly salary level in the sample for the CSC E&T employees was approximately EUR 37.000 and EUR 27.000 for youth, with the average number of staff being respectively 5.05 and 4.1.

The table below shows the basic information used for the lump sum funding levels.

| Field | Sample | Average salary (rounded) | Standard deviation |
|----------------|--------|--------------------------|--------------------|
| E&T | 106 | 37.000 | 17.000 |
| Youth | 329 | 27.000 | 15.000 |

As the data collection of salaries showed a wide variation, it is proposed to:

- Differentiate the funding of Youth organisations from the Education and Training organisations,
- Set three lump sum amounts depending on the number of staff (between one and two, between three and four, and five or more) for ENGOS and informal networks,

²⁷ C(2014) 6145 final: Commission Decision authorising the use of reimbursement on the basis of unit costs for the Civil Society Cooperation actions under the Erasmus+ Programme

- Distinguish between ENGOs and EU-wide formal networks for E&T (an umbrella organisation of European non-governmental organisations (ENGOs)).

The average total costs of the 2022 E&T projects was EUR 155.000²⁸. Applying the co-financing rate for this action of 90% results in a lump sum contribution of EUR 140.000.

Taking into account the average salary level of EUR 37 000, the contribution of EUR 140.000 is set as the middle value lump sum of between 3 and 4 staff.

| E&T (figures in EUR) | | | |
|----------------------|-----------------|---------------------|----------------|
| Average tot cost | 90% cofinancing | average staff costs | average #staff |
| 155.000 | 140.000 | 37.000 | 3,78 |

From this, regression analysis is used to determine the amounts for the other contributions for actions with one to two staff (EUR 105.000), or more than five (EUR 175.000).

Based on the 2020-2021 data of the selected organisation, the average costs after applying the 90% co-financing for EU-wide formal Networks was EUR 530.000. However, due to the maximum amount of the grant set in the work programme, this is limited to EUR 330.000. The methodology of this specific category has been therefore based on the multiplication of the average staff costs (EUR 37.000) by the number of staff.

Consequently, the maximum grant allowed by the call being EUR 330.000 the same extrapolation has been used to determine the amount for the other contribution with seven to eight staff.

Education and Training

| | | N° of staff per organisation | Lump sum proposed |
|---|--------------------------------|------------------------------|-------------------|
| CSC Education and Training | For European ENGOs | From 1 to 2 staff members | EUR 105.000 |
| | | From 3 to 4 staff members | EUR 140.000 |
| | | 5 or more staff members | EUR 175.000 |
| | For EU-wide formal Networks | From 7 to 8 staff members | EUR 280.000 |
| | | 9 or more staff members | EUR 330.000 |

Youth

Applying a similar method for youth, the total average cost for 2022 projects was found to be EUR 126.000. Applying the co-financing rate of 80% resulted in a lump sum contribution of EUR 100.000. Taking into an average staff cost of EUR 27.000, this lump sum contribution corresponds to the middle lump sum value for between 3 – 4 staff.

| Youth (figures in EUR) | | | |
|------------------------|-----------------|---------------------|----------------|
| Average tot cost | 80% cofinancing | average staff costs | average #staff |
| 126.000 | 100.000 | 27.000 | 3,70 |

²⁸ The budget higher than EUR 200.000 have been excluded for this calculation since they result in a grant largely above the maximum grant amount set by the Call.

Again, applying regression analysis and the maximum amount of the grant to this contribution of 100.000 leads to amounts of EUR 75.000 and 125.000 for the other lump sums of between 1 and 2 and more than 5 staff:

| | | | |
|------------------|--|---------------------------|-------------|
| CSC Youth | For European ENGOs and EU-wide informal Networks | From 1 to 2 staff members | EUR 75.000 |
| | | From 3 to 4 staff members | EUR 100.000 |
| | | 5 or more staff members | EUR 125.000 |

In order to assess the reliability of these lump sum contributions, a simulation based on 2022 selected 'projects' with this methodology shows:

- Youth: new budget within error margin (<3%): EUR 4.450.000 vs EUR 4.262.007.
- E&T: new budget has increased due to both the new co-financing rate of 90% (i/o80%) and the global increase of the maximum amount (EUR 125.000 to EUR 175.000) EUR 2.614.668 vs EUR 3.725.000.

The table below shows the global view of the lump sum funding levels for CSC E&T and Youth for 2023-2027.

| | | N° of staff per organisation | Lump sum proposed |
|-----------------------------------|--|-------------------------------------|--------------------------|
| CSC Education and Training | For European ENGOs | From 1 to 2 staff members | EUR 105.000 |
| | | From 3 to 4 staff members | EUR 140.000 |
| | | 5 or more staff members | EUR 175.000 |
| | For EU-wide formal Networks | 9 or more staff members | EUR 330.000 |
| CSC Youth | For European ENGOs and EU-wide informal Networks | From 1 to 2 staff members | EUR 75.000 |
| | | From 3 to 4 staff members | EUR 100.000 |
| | | 5 or more staff members | EUR 125.000 |

The number of staff employed per organisation will be checked by the Agency at final report stage.

3.2 Method to determine the amount of the Union contribution in the form of lump sums contributions for the following actions

- European Higher Education Area (EHEA) – Initiative to support to the implementation of the reforms
- Jean Monnet Centres of Excellence in the field of Higher Education
- Jean Monnet Policy Debate: Networks in the field of Higher Education and in other fields of education and training
- Jean Monnet Teachers Training in other fields of education and training
- National Academic Recognition Centres (NARIC)
- European Universities

- Support for further implementation of the graduate tracking initiative
- Partnerships for Innovation: Alliances
- EPAL - Electronic Platform for Adult Learning in Europe
- Support to better knowledge in youth policy
- eTwinning - National Support Organisations
- EQAVET - European Quality Assurance in Vocational Education and training - designated bodies
- Partnerships for Innovation: Forward looking
- The International Computer and Information Literacy Study (ICILS)
- National units for the Eurydice network
- Implementing renewed priorities for the European Agenda for Adult Learning
- TALIS - Teaching and Learning International Survey
- PIAAC - Programme for the International Assessment of Adult Competencies
- EUROSTUDENT VIII - Social dimension of European Higher
- The International Association for the Evaluation of Educational Achievement (IEA) - International Civic and Citizenship Education survey (ICCS)
- European Youth Together (Large scale and small scale)
- Capacity building in the field of youth
- Capacity Building in the field of VET
- Capacity Building in the field of Higher Education
- Capacity Building in the field of Sport
- EU Youth Dialogue: support to National Working Groups
- Partnership for Excellence - Centres of Vocational Excellence
- Policy Networks (EQF, EUROPASS, EUROGUIDANCE)
- National Erasmus Offices -NEOs
- Erasmus+ Virtual Exchanges
- Social Inclusion and Common Values
- European policy network on teachers and school leaders
- European policy network in the field of education of children and young people with a migrant background

The amount of the single lump sum contribution will be determined for each grant based on the estimated budget of the action proposed by the applicant. The granting authority will fix the lump sum of each grant based on the proposal, evaluation result, funding rates and the maximum grant amount set in the call.

Based on these principles the following steps will be taken to calculate the amount of the lump sum contribution:

3.2.1 Grant proposal

Applicants will provide an estimated budget for the work to be carried out under the action (using the submission form template). The budget will be split into work packages and eligible cost categories, by beneficiary and its linked third party, as explained below

The applicants must fill in a detailed budget table, which enumerates the costs of each beneficiary in the categories listed under point 1.

- a) The applicants must provide in their proposal a breakdown of the lump sum showing the share per work package (and, within each work package, the share assigned to each beneficiary and linked third party);
- b) The proposal must describe the activities covered by each work package;
- c) Proposals for lump sum grants must contain the resources and a detailed cost estimate per work package and per beneficiary and linked third party;
- d) Indirect costs should be calculated by applying a flat rate of 7% to the direct cost;
- e) The co-financing rate will be applied to the total estimated eligible costs, using the funding rate approved in the work programme.

3.2.2 Evaluation

- a) Proposals will be evaluated according to the standard evaluation procedures with the help of internal and/or external experts. The experts will assess the quality of the proposals, against the requirements defined in the call and the expected impact, quality and efficiency of the action.
- b) Experts will need to have the necessary financial know-how as they will also have to check the estimated budget and verify whether the resources proposed, and the split of work packages, allows the achievement of the activities and expected outputs. For each work package, the estimated budget will be assessed for accuracy and if the appropriateness of the resources proposed and the split of lump sum shares allows achieving the activities and expected outputs, to be achieved in the light of the proposed resources.
- c) To ensure equal treatment and benchmark the estimated activities and costs, the experts will consult statistical, historical or any other appropriate data on costs and resources from previously comparable funded projects, and will check that the correct indirect cost and co-financing rate have been correctly applied.
- d) They will propose to remove some ineligible costs and/or actions from the proposal, as e.g cost of activities outside the eligibility period, costs not permitted in the action, indirect cost included as direct cost.
- e) They will check that the costs proposed are in line with the call specifications, the appropriateness of the split of the work packages and the quality of the out puts

3.2.3 Determination of the lump sum amount

- a) Following the proposal evaluation, the authorising officer will establish the amount of the lump sum, taking into account the findings of the assessment carried out (including recommendations from the evaluation committee). If cost or activities items are adapted, the lump sum and the lump sum breakdown are modified accordingly during grant preparation.
- b) The final lump sum is included in the grant agreement as the maximum grant amount. It is calculated by the granting authority by applying the reimbursement rate set out in the call to the total estimated eligible costs in the detailed budget table.
- c) The minimum and maximum amount established in each call will be respected.

3.3 Method to determine the amount of the Union contribution in the form of unit contributions for Erasmus Mundus Joint Masters (EMJM), including Erasmus Mundus Joint Masters – Additional scholarships for targeted regions of the world

3.3.1 Justification

The EMJM aims to enhance the attractiveness and excellence of European higher education in the world and attract talent to Europe, through a combination of a) institutional academic cooperation to showcase European excellence in higher education, and b) individual mobility for all students taking part in the EMJM, with EU-funded scholarships for the best students applying.

The tangible outputs are the selected international EMJM study programmes, at Master course level, jointly delivered and jointly recognised by HEIs established in Europe, and open to institutions in other countries of the world; as well as the graduates of these master programmes.

The new unit cost system will entail three key features:

Firstly, there will be a new unit cost system for student scholarships, leading to a significant simplification for the students and for the consortia managing the scholarships.

Secondly, more visibility will be given to the institutional support of the action.

Thirdly, a unit costs system will be implemented for special needs allowances, contributing to additional costs of students with disabilities.

3.3.2 Method to determine and update the amount of the Union contribution in the form of unit contributions

3.3.2.1 Institutional unit contribution calculation

Under the former EMJMD (2014-2020), the funding ratio was approximately 5% of the grant for the management of the consortium delivering the joint master programme (in the form of a lump sum) and 95% for the scholarships (as unit costs). However, these scholarships also included ‘participation costs’ (namely tuition fees, insurance, etc.), which in reality were directly claimed by the consortium to cover their running costs. In the EMJM, these participation costs and the management lump sum will be merged into a new single institutional unit cost. At the same time, the institutional unit cost system proposed creates an incentive for the consortia to recruit self-funded students, which will increase their chances of becoming fully sustainable after the project lifetime. In this sense, it is preferable over the lump sum system as it was in vigour under the EMJMD project generation and will allow for a more balanced contribution (in other words: programmes that attract more students will obtain more institutional funding).

Similarly, to the student scholarship contributions, a monthly unit cost will be introduced, based on the number of enrolled students. This institutional unit cost will be the same for all types of students (with or without scholarship) and will cover a proportionally larger share of the actual cost to implement a master programme (approximately 80%).

As the EMJM action is open to HEIs from all over the world, statistical data covering a larger area than only the EU or the Erasmus Programme Countries is required. The 2019 OECD Education Indicators published in the OECD report: Education at a glance 2019²⁹, provide an estimate of the average institutional cost per student for all types of education in all OECD countries. The publication provides the total expenditure on educational institutions per full-

²⁹ https://www.oecd-ilibrary.org/education/education-at-a-glance-2019_f8d7880d-en

time equivalent student as an average for all OECD countries (37 countries), which is an appropriate basis to estimate the average cost of a student in a master programme organised between higher education institutions in different countries from all over the world.

The indicators on which the OECD figures are based³⁰ provide an assessment of the institutional cost per student (as a national average). Expenditure per student on educational institutions is influenced by core educational activities (teachers' salaries and pension systems, instructional and teaching hours, the cost of teaching materials and facilities), ancillary services (i.e. costs related to student welfare, at tertiary level) and R&D activities (laboratories, equipment, libraries etc.). The expenditure per student on educational institutions at a particular level of education (tertiary – long cycle in the case of Erasmus Mundus) is calculated by dividing total expenditure on educational institutions at that level by the corresponding full-time equivalent enrolment. Excluded from these indicators are e.g. costs for countries' education ministries and other non-institutional investments. The Erasmus Mundus Joint Masters aims to cover the same institutional costs (core educational activities, ancillary services and research and development costs) and therefore the OECD figures are considered an appropriate proxy.

Benchmarking the average OECD data against average data for 23 EU countries results in a ratio of 98.9/100 and confirms the relevance of the data³¹.

The total expenditure on educational institutions per full-time equivalent student for tertiary education of the long cycle (applicable to master level education as offered under the EMJM) amounts to 16 576 USD-PPP per student per year for the average OECD country³².

As the EMJM involve a minimum of three HEIs from different countries, and often more, taking the OECD average (ranging between high national averages of 51.000 USD for LUX and the lowest of 7.143 USD for LV) is still preferable over applying separate country unit cost rates. Calculating this combination of rates per country would be highly complex. Often students in the same programme follow entirely different mobility paths (not all students study at all partners of the consortium), which would require an individually calculated unit cost for each student, each month. Moreover, the institutional contribution of the Union is usually managed centrally by the coordinator, and allocated to the different partners based on the consortium agreement, taking into account the real needs/costs of the different institutions.

An average is therefore likely to be more accurate for the situation of EMJD consortia, and far more easily applicable than country-based rates, which would require specific unit costs for each student. Moreover, OECD data would not allow us to cover all countries worldwide.

Furthermore, this OECD average amount is a generic average and are estimated to be an underestimation for the EMJMs, considering that international master programmes require more organisation than the average national master programmes on which these calculations are largely based. Indeed, an international joint master requires additional coordination (e.g. meetings and staff) and implementation costs (e.g. staff mobility, student services such as help with registration, housing, visa, etc.) in comparison to 'simple' national master programmes.

³⁰ For more information on the applied Methodology, please see the OECD Handbook for Internationally Comparative Education Statistics 2018 and Annex 3 for country-specific notes (<https://doi.org/10.1787/f8d7880d-en>).

³¹ (Figure C1.2)

³² <https://www.oecd-ilibrary.org/sites/f8d7880d-en/1/2/4/1/index.html?itemId=/content/publication/f8d7880d-en&csp=b2d87f13821f45339443c7ca94aaf6&itemIGO=oecd&itemContentType=book#tablegrp-d1e18349>

Using the currency conversion based on the Purchasing Power Parities (PPPs), equalizing the purchasing power of different currencies by eliminating differences in price levels between countries indicated in the same OECD report³³, the applicable exchange rate is set by the OECD at 0.697 for reference year 2017 in the EU-28 countries, which leads to an equivalent amount of 11.553 EUR per full-time equivalent student per year.

The EMJM action aims to enhance institutional academic cooperation. The commitment at institutional level is crucial to achieve this, so it can be reasonably expected of the higher education institutions involved to express this commitment in a co-financing contribution. For this reason, the Union contribution will be limited to 78% of the OECD estimation of 11.553 EUR, namely 9.011. Like for the student scholarship unit cost (see below) and as the duration of the studies may vary according to the length of the master programme, the unit costs will be defined on a monthly basis: 750 EUR (9011/12).

This leads to an institutional unit cost of **750 EUR** per enrolled student (with or without scholarship) per month for all EMJM programmes.

3.3.2.2 Scholarship unit cost calculation

Under the former Erasmus+ EMJMD action, student scholarships included monthly subsistence costs, travel and installation costs and a participation cost, directly claimed by the consortium (see above). In the new EMJM action, the student scholarships will exclude the participation costs, as scholarship holders will not have to pay for any costs related to their participation in the course, (tuition fees, insurance coverage and any other mandatory costs). The scholarship will thus consist of a monthly unit cost covering subsistence costs, travel costs and installation costs jointly.

The calculation of this monthly unit cost is based on the former EMJMD student scholarships, but applying the same scholarship amount for all students, irrespective of their residence and nationality.

Under the Erasmus+ EMJMD action, the actual student scholarship depended mainly on:

- the student's nationality (either from a Programme Country or Partner Country);
- the student's place of residence (less than 2000km, between 2000km and 3000km and more than 3000km from the first home institution);
- the duration of the master programme (12, 18 or 24 months).

This led to a scenario in which students could have quite different scholarships while attending the same programme at the same place.

The calculation for the new simplified unit cost is based on the previous unit costs actually paid to the last 3 generations of EMJMD students (2017, 2018, 2019).

In this period, an amount of 53.093.000 EUR was paid as scholarship contribution to travel costs, an amount of 8.846.000 EUR to installation costs and 217.836.000 EUR to subsistence costs. Divided by the numbers of respective student months applicable (number of students, multiplied by either 12 - for 60 ECTS programmes, 18 - for 90 ECTS programmes or 24 - for 120 ECTS programmes), the average scholarship contribution under the EMJMD for the last

³³ https://stats.oecd.org/Index.aspx?DataSetCode=SNA_Table4

3 student generations was 1.284 EUR per month³⁴. The proportion expected to be covered by these unit costs varied between 75% and 95% of the overall costs, considering:

- the distance from the students' residence to their first home institution;
- the obligation for all scholarship holders to study in a minimum of two different Programme Countries;
- additional costs related to the issuing of visas and residence permits, as well as the temporary accommodation needs after their arrival in each study destination;
- the students' destination countries, not known in advance and varying in number in accordance with the JMD structure and/or the scholarship holder needs.

Excluded in these calculations were e.g. travels home in between semesters and/or academic years and family arrangements made by scholarship holders

As these unit costs were defined by the Decision for EMJMD based on 2013 data, the simplified new unit cost should take into account a 6.77 % inflation rate³⁵. The new unit costs would thus increase to 1.370 EUR per month. Rounded up for communication purpose and ease of calculation, this leads to a monthly unit cost rate of **1.400 EUR per month** for all scholarship holders in all Erasmus Mundus Joint Master programmes.

3.3.2.3 Special needs unit costs calculation

Cost for special needs for the enrolled students (with or without scholarship), in line with the Decision authorising the use of lump sums contribution and unit contributions for the Marie Skłodowska-Curie Actions under the Horizon Europe Programme 2021-2027.

In order to establish a special needs allowance based on unit cost, the MSCA special needs unit costs³⁶ will be applied.

MSCA performed an analysis of costs incurred for researchers/staff members with disabilities (e.g. long-term physical, mental, intellectual or sensory impairments), participating in training and research activities. Based on historical evidence, these costs were grouped according to the average cost of the items or services considered. On this basis, a list of categories was established based on quantitative and qualitative data, each corresponding to a range of costs.

Taking into account the existing margins due to different price levels of special needs items or services across countries and the impact that fluctuations in the range from 1 000 to 2 000 EUR have at the lower end of the scale of the categories, the final unit costs were set as follows:

³⁴ Ranging between € 1.389 / mth for 90 ECTS students travelling from >4.000km, to 1.089 / mth for 120 ECTS students from Europe, or less if their studies took place in their country of residence.

³⁵ Eurostat, rate based on EU 27 (without UK) - HICP index (Index 2015 = 100), whereas 2013 MTH 1 is 98.34 and 2020 MTH 1 is 105.00.

³⁶ For a more detailed justification of the costs and categories applied, please refer to the Decision authorising the use of lump sums contribution and unit contributions for the Marie Skłodowska-Curie Actions under the Horizon Europe Programme - Ares(2021)902919.

EUR 3 000
EUR 4 500
EUR 6 000
EUR 9 500

EUR 13 000
EUR 18 500
EUR 27 500
EUR 35 500

EUR 47 500
EUR 60 000

The triggering event for the payment of the special needs allowance will be the enrolment of a student (with or without scholarship) with disabilities whose long-term physical, mental, intellectual or sensory impairments are certified by a competent national authority and of such nature that their participation in the action would not be possible without the special needs items or services.

Beneficiaries shall claim the closest lower rate per student compared to the estimated actual costs of his/her special needs. Special needs allowance may be assessed on a case-by-case basis, in order to further ensure compliance with the principle of sound financial management. Where this assessment shows that the needs described do not match the category of allowance proposed, the Agency may adjust that the category of need be changed to reflect the description.

Costs lower than 3 000 EUR and higher than 60 000 EUR shall not be reimbursed through the special needs allowance.

The amount of the monthly unit contribution shall be calculated as follows:

$$\{(special\ needs\ unit \times (1/number\ of\ months))\}$$

The number of months in the formula above shall correspond to the number of months the special needs items or services were used or produced for implementing the action, depending on the nature of the items or services. For one-off costs, the number of months shall correspond to 1.

Enrolled students will declare what type of items/services are needed and their cost. The applicable unit cost will be identified as the rate corresponding to or immediately lower than the estimated expenses. This unit cost is a contribution, and is not intended to fully cover the actual costs.

The use of the MSCA unit costs for special needs are justified under the EMJM as well, because:

- The EMJM students are from the same target group, namely excellent students/researchers from all around the world, from the same age group, selected on the basis of their excellence with the same kind of training (classroom, group work, etc.) and research (laboratory work, thesis, internships) activities;
- EMJM students with special needs will thus require the same type of assistance in terms of travel, international mobility, infrastructural adaptations, technological equipment and specific services (e.g. assistance by third persons, adaptation of work environment, additional travel/transportation costs) than they need under the MSCA, with similar costs.

Like for the Horizon Europe Programme, inclusiveness is a specific aim of the Erasmus+ Programme. EMJM should be accessible to all students, regardless of their origin, background or the special needs they require

Finally, using the same special needs unit cost scheme means a significant simplification for beneficiaries (universities applying for both EMJM and MSCA grants) and for students (EMJM graduates often enrol in PhD programmes).

| Erasmus Mundus Joint Master | | |
|------------------------------------|--|----------------------------------|
| Institutional unit cost | 750 EUR | per month/per enrolled student |
| Scholarship unit cost | 1400 EUR | per month/per scholarship holder |
| Special needs unit cost | (special needs unit x(1/number of months)) | |

4 Sound financial management and co-financing principles and absence of double financing

The principle of sound financial management, co-financing and no double financing are ensured.

The methodologies explained in section 3 ensures sound financial management since they all aim at establishing an amount which is a proxy of the real costs. The methodologies are based on either costs reimbursed under the previous programme, statistical data or the estimated budget of the beneficiary. The proposed budget in the application will have been assessed via expert judgement based on reference and comparative data to ensure that the submitted information is reasonable, and the overall feasibility of the project.

Co-financing will be ensured by applying the reimbursement rate set out for each action during the preparation of the Grant Agreement. The co-financing is also ensured in actions where the cost covered by the action are not fully covered with the value of the contributions, and in some other actions the use of contributions guarantees the co-financing principle as it was taken into account for the lump sum or unit cost calculation.

Absence of double funding can be ensured by clearly identifying in the call and in the grant agreement all categories of eligible and ineligible the costs and activities which are covered, and subsequently checking in e-Grants or other systems any potential overlapping with other grants awarded to same beneficiary.