

2019 Key Action 1 (KA1) Higher Education Handbook

For UK Higher Education Institutions and Consortia
Managing Higher Education Mobility Projects

KA103

Version 2: 18 September 2019

This handbook is a guidance document for the management of Key Action 103 projects - Mobility of Individuals within Higher Education. This handbook is designed to provide information to support your Grant Agreement, including all associated annexes and the [2019 Programme guide](#). Your Grant Agreement and the 2019 Programme Guide are the primary documents you should refer to and need to comply with.

Should any information in this handbook differ from either the Grant Agreement or the 2019 Programme Guide, the content of the Grant Agreement, its annexes and the Programme Guide will take precedence. If you have any queries about the content of this Handbook please contact erasmus@britishcouncil.org

Overview of the handbook

This is **version 2** of the 2019 Key Action 103 Operational Handbook. If future versions of this document are created, the table below will record an overview of changes made compared to previous versions:

Page number in previous version	Change	Page number in this version
11	Exceptionally, student agreements can be signed by all parties no later than within 2 months (60 days) since the mobility start date.	11
30	Staff mobility grant rates corrected to from 160/140/120 to 180/160/140	30

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1. Brexit

The latest information about UK participation in Erasmus+ after Brexit can be found on the [Brexit Update](#) page of the Erasmus+ UK website. Please check this page regularly or [subscribe](#) to our newsletter.

2. General

Key Action 1 supports mobility in the education, training and youth sectors and aims to bring long lasting benefits to the participants and the organisations involved. This Action provides opportunities for individuals to improve their skills; enhance their employability and gain cultural awareness.

For more information about Erasmus+ and Key Action 1, please refer to the following sections of the [2019 Programme guide](#):

General Information about the Erasmus+ Programme	Pages 5 - 24
General Information about Key Action 1	Pages 29 - 32
Key Action 1 Higher Education Mobilities	Pages 33 - 50
Information for Applicants	Pages 252 - 270
Specific rules relating to KA1 Higher Education Projects	Pages 271 - 276
Dissemination - A practical guide for beneficiaries	Pages 314 - 319
Glossary of Key Terms	Pages 320 - 328
Useful References and Contact Details	Pages 329 - 331

This Operational Handbook only applies to KA103 (Mobility between Programme Countries) projects. For information on delivering a KA107 (International Credit Mobility) project, please see the relevant KA107 Operational Handbook available on the '[Manage Your Grant](#)' section of the website.

2.1. Eligibility and ECHE Compliance

The [ECHE annotated guidelines](#) outline the requirements the HEI must fulfil in order to comply with the Charter principles. Please also refer to the [ECHE Monitoring Guide](#) for more information. HEIs must respect all the provisions of the ECHE during the implementation of the project.

Compliance of the HEI with the ECHE principles is monitored by the National Agency through a variety of measures. HEIs must respect all the provisions of the ECHE during the implementation of the

project. Violation of any of the ECHE principles and commitments may lead to its withdrawal by the European Commission. You can find the recently published UK NA Compliance report which highlight areas of best practice [here](#).

Changes to the ECHE Policy statement

HEIs are able to update their Erasmus Policy Statement (“EPS”) at any stage during the Erasmus+ Programme cycle in order to reflect their latest strategy. To change an EPS, HEIs are required to amend the EPS on their website and notify the NA to ensure accuracy and compliance with the ECHE.

Consortium Changes

If you wish to add a new partner to an existing consortium, the amendment needs to be approved by the UK NA. The NA will assess the implications of the change to the consortium and check that all eligibility criteria have been fulfilled and there is no impact on the overall scope and quality of the consortium.

Mergers and Splits

If an HEI holding an ECHE, or any member of an accredited consortium, is involved in a merger or split, or if their name changes, they should inform the UK NA as soon as details are known, specifying the type of merger, split or new name. A new ECHE may be needed for a new institution.

Information about how to update your organisation’s ECHE in the event of a merger/split can be found on the EC’s ECHE page [here](#).

Overseas Campuses or Franchises

If the campus located in another Programme Country is not an independent institution but dependent on the parent institution, such as a UK University, and covered by its ECHE accreditation, the students in the other Programme Country can participate in mobility projects as students of the UK University. However, they cannot carry out the mobility activities in the country of the sending institution (UK) or in the country where they have their accommodation during their studies.

If the campus located in another Programme Country is an independent institution, it should then apply for its own ECHE, and only when covered by that ECHE can students and staff take part in Erasmus+.

Overseas Countries and Territories (OCTs)

Under the rules of Erasmus+, individuals and organisations from or to Overseas Countries and Territories (OCT) shall be eligible for the Erasmus+ grant. This means that individuals and organisations from the OCTs can participate in the programme on a 'Programme country' status, the 'Programme country' being the Member State with which they are connected. The list of OCTs can be found at [here](#).

The grant rate for placements to OCTs will be based on the grant rate for the Programme Country to which the OCTs are connected. For example, a UK student going to Sint Maarten, which is an OCT of the Netherlands; here, the grant rate for a mobility to Sint Maarten would be based on the grant rate from UK to the Netherlands. HEIs from the UK or British Overseas Territories cannot use Erasmus+ funding to cover expenditure for mobility placements in the UK or other British Overseas Territories as Erasmus+ mobilities must be transnational.

2.2. GDPR Compliance

For the purposes of the Data Protection Legislation, the European Commission – Department for Education is the Controller, the Processor is the UK National Agency and the beneficiary is the Sub-Processor.

All personal data contained related to the implementation of an Erasmus+ project shall be processed in accordance with:

- National legislation by the NA, in particular the UK Data Protection Act 2018;
- in accordance with Regulation (EC) No 45/2001 and Regulation (EU) 2016/679 of the European Parliament and of the Council on the protection of natural persons with regard to the processing of personal data and on the free movement of such data (and/or such law(s), regulation(s) and secondary legislation as may transpose the General Data Protection Regulation into the domestic law of all or any part of the United Kingdom), and repealing Directive 95/46/EC as from its entry into force on May 2018¹;
- the Data Processing Clauses as set out in Annex VIII of the Grant Agreement.

For more information please refer to the Grant Agreement – Special Conditions – Article I.14, the Grant Agreement – Annex VIII and the 2019 Erasmus+ Programme Guide - Data Protection article.

3. Grant Agreement Issuing and Signing

3.1. Establishing Grant Rates

Grant rates are established within parameters decided by the EC. HEIs must pay all grants at the rates given in this Handbook and Annex IV of the Grant Agreement.

3.2. Allocation of Funds

The NA analyses applications carefully to ensure that the allocation of funds is fair and transparent. Grants to beneficiaries may be awarded for less than the amount applied for, but not more. The grants budget is allocated on the basis of:

- overall KA103 budget;
- applications from individual HEIs, as assessed by the NA;
- grant rates established by the NA, within EC guidelines;
- past performance.

3.3. Payment Conditions

The aim of the pre-financing is to provide the beneficiary with a float.

¹ Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data, Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC.

A first pre-financing payment of 70% of the HEI's agreed grant amount will be made 30 days after the NA has countersigned the Grant Agreement which has been signed by the nominated legal representative and returned to the UK NA.

If the HEI has an outstanding debt, this may delay the signature of Grant Agreements, and the NA may offset this against any new Erasmus+ payments due. The NA will give advance notice of an intention to offset debt.

3.4. Bank accounts and currency

All payments from the UK NA to the HEI are made in euros. The HEI must ensure that its designated bank account can receive payments in euros. The UK NA is not responsible for any delay or exchange rate losses caused as a result of the HEI's bank account's inability to receive such payments.

The beneficiary with general accounts in a currency other than the euro must convert costs incurred in another currency into euros at the average of the daily exchange rates published in the C series of the Official Journal of the European Union, determined over the corresponding reporting period (available [here](#)).

If no daily euro exchange rate is published in the Official Journal of the European Union for the currency in question, conversion must be made at the average of the monthly accounting rates established by the Commission and published on its [website](#), determined over the corresponding reporting period.

The beneficiary with general accounts in euros must convert costs incurred in another currency into euros **in accordance with their usual accounting practices**.

Any conversion into euro of costs incurred in other currencies must be made by the beneficiary at the monthly exchange rate established by the Commission and published on its website² applicable on the day when the bank account of the beneficiary is credited.

3.5. Grant Awards

The Grant Agreement details the payment and reporting arrangements for the project. Grant recipients may not benefit from any other EC funding for the same activity, even if this is across years.

The Erasmus+ grant is intended to co-finance mobility activity. Under no circumstances may the grant give rise to a profit. Please see page 250 of the 2019 Programme Guide for further information.

Amendments to agreements must be requested in writing. Amendments to agreements then take the form of a letter from the NA or a written amendment signed by both parties.

Please note that if information contained in this handbook differs from that in the Grant Agreement, then the Grant Agreement will take precedence.

² http://ec.europa.eu/budget/contracts_grants/info_contracts/infoeuro/infoeuro_en.cfm

3.6. Grant Agreement and Annexes

The Grant Agreement (Special Conditions) is split into several sections and annexes:

- **Annex I: General Conditions**
The General Conditions provide an overview of the obligations of beneficiaries. They can be found on the Erasmus+ [website](#).
- **Annex II: Description of the Project; Estimated budget of the project**
- **Annex III: Financial and contractual rules**
This annex provides information on the financial and contractual rules surrounding the Grant Agreement. There are two versions of this annex; one for single organisation beneficiaries and one for consortia beneficiaries. It is the responsibility of the beneficiary to read this information and to ensure compliance.
- **Annex IV: Applicable Rates**
This annex defines what rates are applicable for incoming and outgoing students / staff for a KA103 project.
- **Annex V: Templates for agreements to be used between beneficiary and participants**
- **Annex VII: Bank Details Form**
This must be submitted at Grant Agreement countersigning, even if no changes have been made to the institutional bank account. This will ensure that the UK NA makes all payments to the correct account.

The form should be signed by someone (with the requisite authority to make financial decisions on behalf of the HEI) from the managing HEIs finance department. Alternatively, this form can be completed on letter-headed institutional paper and submitted to the UK NA. There are further signing instructions provided with this annex and they should be consulted prior to the submission of your Bank Details form.

- **Annex VIII: GDPR UK National Agency Processor to Sub-processor Contractual Governance**
This annex sets out the contractual governance that manages the data that is exchanged between the UK NA and the beneficiary.

Important: Please ensure that you check your Grant Agreement to confirm that the correct details have been listed for the legal representative and contact person for the project. If the legal representative or contact person for your project has changed since the submission of your application, you will be required to update the UK NA. It is recommended that this is done at your earliest convenience so that there any potential delay to the countersigning of your Grant Agreement is minimised.

3.7. Signatures

An original paper copy of the grant agreement between the NA and the HEI must be signed with original signatures and kept in hard copy.

Documents between home/host institutions and mobility participants can be signed by one party and scanned to another to be countersigned. Both the HEI and the participant must retain copies that are signed by all parties.

Electronic signatures are acceptable on the following documents, and electronic (or scanned) versions may be retained:

- Inter-Institutional Agreements;
- Participant Grant Agreements (student & staff);

- Learning/Mobility Agreements between the sending and receiving HEIs and the individual students, and staff teaching or training programmes.

Important note: An “electronic signature” may be a scanned signature and locked pdf signature or other form of secure signature. **It cannot be a typed signature.** For more information please refer to your institution’s internal policy on digital signatures.

Whilst electronic signatures on Erasmus+ mobility documents are possible and widely accepted, it is each HEI’s responsibility to ensure that the digital signatures comply with their own internal institutional digital signing policies or procedures.

3.8. Record keeping

HEIs must keep all applications and signed Grant Agreements for a period of **five years** (three years for grants not exceeding EUR 60,000) from the date of closure of the applicable Grant Agreement. This includes all applications and mobility agreements with students and staff, and documents concerning disbursement of grants, for all Erasmus+ mobilities. Please see article Checks and Audits on page 268 of the [2019 Programme guide](#) and Annex I of the Grant Agreement for further information.

3.9. Dissemination

By signing the Grant Agreement with the UK NA, the HEI accepts that their information may be published on the [Erasmus+ Funding Results webpage](#).

The HEI also agrees to promote the programme and the mobility opportunities for their students and staff. This should include, but is not limited to:

- promotional talks by returning students at local schools, colleges, within the HEI etc.;
- production and posting of promotional materials;
- adherence to the requirements of the ECHE, including making the Erasmus+ policy easily accessible via the HEI’s website.

Information on use of the European Union emblem can be found in Article II.8 of the Grant agreement’s [General Conditions](#) and is also published on the [UK NA Promotion and Dissemination website](#).

The preferred option to communicate about EU funding is to write “Co-funded by the European Union”, next to the EU emblem on the communication material where the EU emblem is used. The positioning of the text in relation to the EU emblem is not prescribed in a given way but the text should not interfere with the emblem in any way. The beneficiary may use the Dissemination Platform as per the EC’s instructions.

4. Project activities

4.1. Period of Activity

The project duration is either 16 or 24 months, as specified in the HEI’s application form and Grant Agreement. All mobility periods must be completed by the project end date as specified in section

I.2.2 of the Grant Agreement. If the Grant Agreement has not been signed by both parties (the NA and the HEI) prior to activity taking place, the HEI will be fully responsible for any risks that may arise from such activity (as with any activity that falls outside the terms of the Agreement).

For 16-month agreements, the grant is awarded for mobilities taking place from 1 June 2019 to 30 September 2020.

For 24-month projects, the grant is awarded for mobilities taking place from 1 June 2019 to 31 May 2021.

Mobilities which take place across two Grant Agreement periods/call years should be reported as two separate mobilities, and each mobility must meet the minimum duration.

24 Month Projects

The EC has confirmed that the purpose of 24-month projects is to provide flexibility at the end of the project. Project funding should ideally be allocated to participants within the first year, but funding can be spent throughout the entire project duration. This is to allow the NA to successfully reallocate funding where necessary. Although a 24-month project spans two years, institutions can still apply for funding for each year, but must ensure no participants are double funded.

Changing the duration of your project

You can change the duration of your project if this will be of benefit to you. 16-month projects can be extended to 24-months and 24-month projects can be reduced to 16 months. If you would like to change the duration of your project, you must **make the [request in writing to the UK NA](#) no later than 30 days prior to the project end date**, clearly stating the project number and the reasons for extension.

4.2. Making changes to your project

Change of project coordinator and project contacts

If the coordinator changes during the Erasmus+ project, you need to complete and email the [Project Contact Form](#) to the National Agency (NA) as soon as you are aware of a change.

Change of Legal Representative

If your Legal Representative changes during the Erasmus+ project, you must complete the [Change of Data form](#) and email it to the UK NA. You must also attach a letter of appointment from your HR department to confirm the new signatory has the authority to sign legal documents on behalf of the institution. You must then send the same documents to the ECHE team at the EC: EACEA-ECHE@ec.europa.eu

4.3. Selection Procedures

The selection of staff / students, as well as the procedure for awarding them a grant, must be fair, transparent, coherent and documented and must be made available to all parties involved in selecting students and staff. Please see examples of selection criteria for on pages 273 in the [2019 Programme Guide](#).

4.4. Agreements with Individuals

Grant Agreement

Before a staff or student mobility commences, the HEI must ensure that each student or staff member has signed a mobility Grant Agreement (GA) with their home HEI, formally accepting the grant and acknowledging the obligations associated with its acceptance. Exceptionally, the GA must be signed by all parties no later than within 2 months (60 days) since the mobility start date.

The agreement must be retained as a record of the mobility. If the HEI does not retain the signed agreement, in hard copy or electronically, the NA may recover the grant at a future audit. Scanned copies of documents with original signatures are acceptable for audit purposes.

Standard templates of participant agreements form Annex II.6, II.7 and II.8 of the Grant Agreement. The templates are the minimum requirements and the HEI must use the text in full for agreements with students or staff. The HEI may add to the standard text if they wish.

Student Learning Agreement

The sending HEI, the host HEI or other organisation, and the mobile participant, will need to sign the Learning Agreement (LA) for studies and traineeships or the staff teaching or training agreement.

Prior to the mobility start date, the student, the home HEI and the host HEI must sign the Learning Agreement. Exceptionally, the LA must be signed by all parties no later than within 2 months (60 days) since the mobility start date.

Learning Agreements may be signed electronically, and if HEIs have an IT system in place to produce the Learning Agreement or the Transcript of Records, they can use this.

The “During the mobility” section of the Learning Agreement should be completed if there are changes after the student has started their period abroad. The section “After the mobility” should be completed by both HEIs unless this information is kept in another format (with Erasmus+ documentation relating to the student).

Amendments to the agreement must be agreed through a formal notification by both parties, either by letter or electronically, with copies retained for audit purposes. If you wish to issue an amendment via email, a response confirming the change is necessary. Evidence of this should be retained for audit purposes.

There must be documentary evidence of the duration of the mobility. These dates should be provided in the Transcript of Records for study (see the Learning Agreement “After the Mobility”), in the traineeship certificate (see Learning Agreement for traineeships “after the Mobility”) or, if the HEI wishes, a Certificate of Attendance may be appended to the Transcript. These documents may be supplemented by other supporting documents, e.g. where any additional time needs to be justified. Boarding passes will not count as sufficient evidence but should be retained for audit purposes.

Staff Mobility Agreement

The staff mobility agreement **must be signed prior to departure** and the final mobility programme should be formally agreed by both the sending and receiving institution. In the case of invited staff

from enterprises and staff training at programme country enterprises, the enterprise must sign this agreement.

The templates are available on our [website](#) (see: Agreements section).

Any amendment to the agreement shall be requested and agreed by both parties through a formal notification by letter or by email.

4.5. Inter-Institutional Agreements

Mobility between Programme Country HEIs

Student study mobility and **staff teaching** mobility must be covered by an Inter-Institutional Agreement. It must be signed **before mobility begins**. The Inter-Institutional Agreement may cover cooperation between more than one HEI. The international version of the Inter-Institutional Agreement incorporates aspects of the ECHE into the agreement. The template is available to download on the [Erasmus+ website](#) under the 'Agreements' section. **The original text cannot be altered, although extra clauses may be added.**

Mobility between HEIs and providers of student traineeships and staff training

Student traineeships and staff training do not require an Inter-Institutional Agreement between the sending HEI and the host organisation (HEIs based in Programme Countries that act as receiving organisations for traineeships must hold the ECHE). Although not mandatory, HEIs can choose to include traineeships and staff training in their Inter-Institutional Agreements if they wish. In the event of a traineeship, registration of the host organisation on the EC's EU Login [website](#) is optional.

4.6. Protection and safety of participants

Protection and safety of participants involved in the Erasmus+ projects are important principles of the Programme. All participants should have the opportunity to take full advantage of the possibilities for personal and professional development and learning. This should be assured in a safe environment which respects and protects the rights of all persons.

To this end each organisation participating in the Erasmus+ Programme must have in place effective procedures and arrangements to promote and guarantee the safety and protection of the participants in their activity. With this regard, **all participants must be insured against the risks linked to their participation in mobility activities**. The Erasmus+ Programme does not define a unique format of insurance, nor does it recommend specific insurance companies. The Programme leaves it up to project organisers to seek the most suitable insurance policy according to the type of project carried out and to the insurance formats available at national level. Furthermore, it is not necessary to subscribe to a project-specific insurance, if the participants are already covered by existing insurance policies of the project organisers.

In either case, the following areas must be covered:

- wherever relevant, travel insurance (including damage or loss of luggage);
- third party liability (including, wherever appropriate, professional indemnity or insurance for responsibility);

- accident and serious illness (including permanent or temporary incapacity);
- death (including repatriation in case of projects carried out abroad).

If applicable, it is strongly recommended that participants in transnational activities are in possession of a European Health Insurance Card. This is a free card that gives access to medically necessary, state-provided healthcare during a temporary stay in any of the 28 EU countries, Iceland, Liechtenstein and Norway, under the same conditions and at the same cost (free in some countries) as people insured in that country. More information on the card and on how to obtain it is available [here](#).

4.7. EU Survey (Participant report)

30 days before the mobility end date, students will receive an invitation to submit an individual participant report. Staff will receive the invitation on their mobility end date.

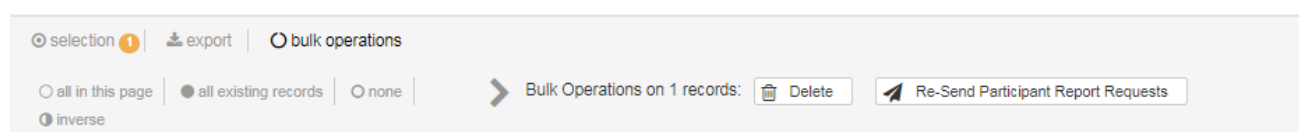
The online report request will be automatically generated, and the survey must be completed by all mobility participants within 30 days of completing their mobility. The participant reports will not be sent out if the mobility is in draft, i.e. mobility record must be either completed or revalidated in order for the survey to be sent to the participants.

Completion of the EU Survey forms part of the Grant Agreement, HEIs are responsible for ensuring individuals complete these reports.

Re-issuing EU Survey

You can resend the Participant's Report manually from the Mobility Tool+ by following these steps:

- enter your project / tab Mobilities (you may search for the participant using the search engine)
- click on the circle button next to the participant's first name so it fills with black colour
- click on Bulk operations
- click on Re-send participants report request



Mobility participants should receive the EU Survey to the email address listed in the MT+ participant's record and from the address 'replies-will-be-discarded@ec.europa.eu'. We advise all mobility participants to check the email spam box before reporting that the survey hasn't been delivered.

Completing the EU survey is a contractual obligation and the UK NA will require justification of any missing reports.

For more information please refer to the [Mobility Tool+ - Guide for Beneficiaries](#).

4.8. Incoming Erasmus+ Mobility

HEIs must make appropriate provision for the health, safety and security of incoming students and staff in the same way as for any other visitor. This includes compliance with all relevant legislation.

Incoming students are not subject to fees for tuition, registration, examinations and access to laboratory and library facilities or other charges at the receiving institution. However, small fees may be charged for costs such as student unions or the use of miscellaneous material such as photocopies, laboratory products, on the same basis as these are charged to local students.

4.9. Early Returners, Short Durations and Interruptions of Mobility Periods

Early Return

If a mobility participant returns early but the mobility meets the minimum duration requirement, the HEI processes this change in the MT+ without reporting to the UK NA. The Erasmus+ financial grant can cover only the actual period spent abroad and any overpayment must be returned to the project, either by requesting the difference from the mobility participant or by using the Organisational Support budget.

Short Durations

A short duration request is applicable for students or staff members taking part in Erasmus+ who do not meet the minimum duration required for their stay, due to force majeure.

As per page 323 of the [2019 Programme Guide](#), force majeure is defined as '**an unforeseeable exceptional situation or event beyond the participant's control and not attributable to error or negligence on his/her part**'. Therefore, short duration requests should not be submitted for placements that have not yet started.

Requests should be made only in clear and certain circumstances which are beyond the control of the student and which have an impact upon the student's course progress or wellbeing. Generally, this will include:

- serious illness or injury, where a medical certificate states that the student was unable to attend classes,
- bereavement related to close family members such as parents or grandparents,
- major political upheaval or natural disaster in the host country requiring emergency travel and this has impacted the student / staff studies; or,
- a traumatic experience which could include involvement in or witnessing of a serious accident; or witnessing or being the victim of a serious crime, and this has impacted on the student / staff member.

In order to comply with the European Commission's requirements, we expect full evidence to be provided for the circumstances mentioned above. Force majeure does NOT cover:

- disputes between students and institutions that could potentially be resolved, particularly with traineeship placements;
- cancelled classes by the host institution;
- students / staff simply wanting to return home;
- foreseeable circumstances that could be resolved by either the student, sending or host institution; or
- labour disputes, strikes, financial difficulties or any default of a service, defect in equipment or materials or delays in making them available, unless they stem directly from a relevant case of force majeure as identified on page 4 of the [General Conditions](#).

Please note this list is not exhaustive and we look at each form on a case by case basis.

To notify the UK NA please use this [short duration request form](#).

If a short duration request is approved, the HEI must amend the mobility record in the MT+ to the real dates spent abroad and tick the force majeure box. The Erasmus+ grant only covers the actual period spent abroad and the mobility participant is only entitled to receive the extent of the grant that corresponds with the actual duration of the mobility. Any remaining funds must be refunded either by requesting the difference from the mobility participant or by using the Organisational Support budget.

In case of suspension by the participant of the grant Agreement with the beneficiary due to force majeure, the participant must be allowed to continue the activities after the interruption, provided that the mobility end date does not exceed the final date of the project. This should be reported in MT+ as a single mobility with an interruption period.

If a short duration request is rejected, the HEI must delete the mobility record from the MT+ and return the Erasmus+ financial grant to the project either by requesting the difference from the mobility participant or by using the Organisational Support budget.

If a staff member / student undertakes an activity not related to their mobility, this should be considered as an interruption day and must be recorded on Mobility Tool+ as such. Any interruption days will not be funded and will be deducted from the mobility duration. Please ensure that a mobility with interruption days still meets the minimum duration for the relevant mobility.

Please note: Short durations due to force majeure are included in the maximum 12 months mobility per study cycle.

Interruptions

If a staff member / student undertakes an activity not related to their mobility, this should be considered as an interruption day and must be recorded on Mobility Tool+ as such. Any interruption days will not be funded and will be deducted from the mobility duration. Please ensure that a mobility with interruption days still meets the minimum duration for the relevant mobility.

4.10. Visas

Depending on their nationality and country of destination, non-EU nationals might need a short-stay or a long-stay visa or a residence permit.

UK HEIs must provide assistance, where required, in securing visas for their outbound mobility participants, however, the mobility participants themselves remain responsible for the visa application. The HEI must post information about visas and the time needed to obtain a visa on its website and provide documentation to support visa applications in a timely fashion. The website should, where possible, provide details of a contact person who can assist with visa related issues, with a description of the services offered and the support that can be provided.

UK HEIs are strongly advised to warn partner institutions that the UK visa process can be lengthy. This also applies to incoming trainees, where the UK NA is the sponsor. In these cases, the process is shortened if all documents are submitted to the UK NA with the visa application at least two months before the date of travel, and in the correct format. Sending institutions should cover fees, insurance and bank transfer costs (or part of these) using Erasmus+ organisational support or project management funds, i.e. not deducting these from the participant's individual support grant. Any cost

charged to the participant should be clearly explained to them and agreed to by both parties, in advance.

For more information please refer to the [EU Immigration Portal](#).

4.1. Academic Fees

No university fees (for tuition, registration, examinations, access to laboratory and library facilities, etc.) may be paid at the host HEI. However, small fees may be charged for costs such as insurance, student unions, the use of miscellaneous material such as the photocopying of academic material and use of laboratory products on the same basis as these are charged to local students.

HEIs may not request any payment or charges from outgoing students in connection with the organisation or administration of the Erasmus+ mobility period.

4.2. Tuition Fee Contribution and Support

For the 2019/20 academic year, Tuition Fee Contributions and Support will apply to students who start courses at institutions in the UK on or after 1 September 2012 who are taking an Erasmus+ study year or Erasmus+ traineeship for a complete academic year abroad. The definition of a complete academic year for this purpose is at least 24 weeks (excluding weekends and the usual holidays)³.

4.3. Grant Status of Students and National Schemes

All students' entitlements to national grants or loans for study at their home HEI must be maintained during their period abroad. Entitlement must not be discontinued, interrupted, or reduced while they are studying in a participating country and receiving an Erasmus+ mobility grant.

4.4. Students from disadvantaged backgrounds (Widening Participation)

A supplementary grant is available for those students from a disadvantaged background who are undertaking a work or study placement. The grant may be paid to students from disadvantaged groups who are also receiving funding for special needs.

The Disadvantaged Background supplementary grant is an extra €120 per month for disadvantaged students on study placements and extra €20 per month for disadvantaged students undertaking traineeships.

Eligible students are defined as disadvantaged **by the relevant authorities** and are eligible for grants and loans. For example, in England, these are students from households with annual incomes of £25,000 or less. For students from outside the UK, decisions on entitlement to this grant are made on the same principles as the £25,000 threshold stated above. That is, if the student is entitled to receive

³ For the tuition fee rules for England, click [here](#); for Wales, click [here](#); for Scotland, click [here](#); for Northern Ireland, click [here](#)

extra payments based on national or regional criteria for disadvantage and can provide evidence of this.

However, it is ultimately at the discretion of individual HEI how it uses the payment for disadvantaged students, referring to any measures already taken within the HEI to ensure parity.

HEIs must report all students eligible to receive the Disadvantaged Background supplementary grant in the Interim Report to ensure funding is provided.

4.5. Erasmus+ Student Charter

HEIs must issue each student with the [Erasmus+ Student Charter](#) before the mobility period commences, as it is an annex to the Learning Agreement.

4.6. Multiple Erasmus+ Periods

Students may undertake up to 12 months mobility for each cycle of higher education study. This may be in any combination of study and traineeship, provided that each mobility meets the minimum requirements for duration etc.

This maximum duration applies if a student has undertaken a degree of the same level previously. This rule applies to each study cycle. Students can undertake numerous mobilities providing they do not exceed a total of 12 months participation in any one cycle.

For degrees covering two cycles, for example a first degree leading to a master's level qualification, mobility periods up to a total duration of 24 months may be undertaken.

5. IT Tools

5.1. Online Linguistic Support (OLS)

[Online Linguistic Support](#) (OLS) is an online platform, designed to improve the knowledge of the language in which an Erasmus+ participant will work, study or volunteer, before and during their stay abroad. The OLS offers online language assessments and, where applicable, language courses to any student participating in an Erasmus+ mobility activity lasting two months and longer.

Please note that as of March 2019, Higher Education mobility participants have the opportunity to access OLS language courses in both their mobility language and the official local language(s) of their destination country. They can simply **express their interest** by selecting the language(s) they would like to learn with OLS.

You also have the possibility of manually allocating multiple languages to mobility participants provided the language course is available at the required level. Manual language course allocation is not relevant for higher education mobility participants who can select the language courses themselves. Manual allocations of multiple languages linked to the same licence can be made to any mobility participants. Please refer to the [BEN User Guide](#) (March 2019) for more information on language course licence allocation.

Organisational Support (OS) funding may be used for training in languages which are not currently provided by the EC.

As of 2019 the Erasmus+ Online Linguistic Support (OLS) is available in 24 languages:

Languages	Language assessment available	Language course available
English, German, French, Italian, Spanish, Dutch	Yes	Yes – all levels
Portuguese	Yes	Yes – up until B2 level
Czech	Yes	Yes – up to A2 level
Bulgarian, Danish, Greek, Finnish, Croatian, Hungarian, Polish, Romanian, Slovak, Swedish	Yes	Yes – at A1 level
Estonian, Lithuanian, Latvian, Slovenian	Yes	Yes – up to A1 level
Irish Gaelic, Maltese	Yes	No

The goal is to progressively expand the OLS system to all EU official languages by 2020.

Where a student undertakes mobility in a language not supported by the OLS, your institution should use its OS funding to provide support for these students. When using the OLS system, we recommend using Google Chrome or Mozilla Firefox.

Recent graduates are able to participate in OLS assessments and courses.

OLS Assessment

OLS Assessments are mandatory for students that are undertaking mobility in a language that is not in their native language and for a minimum period of two months. The licences must be distributed to the participant from the sending institution after their selection for the mobility activity. The beneficiary must ensure the uptake of the licences and make every effort to ensure that all the allocated licences are used by the selected participants.

For example, if a UK student undertakes a mobility in France but will be working in English, they are not required to complete the assessment. However, if the UK student intends to work in French, they would then need to complete the assessment and could participate in a language course.

If an overseas student enrolled at a UK institution is going to undertake a mobility in English, then it is at the institution's discretion to determine the level of proficiency. If it is at a 'native' level, then they are exempt from the assessment. The NA would expect that overseas students have to prove they have a high-level understanding of English to be accepted onto a degree course in the UK.

The results of the language assessment test carried out by participants before their departure will not stop them from taking part in the mobility activity, whatever the result, unless the receiving HEI has specified the language level required in the Inter-Institutional Agreement.

The beneficiary must ensure that mobility participants take the first OLS language assessment before their mobility period as it is a pre-requisite for the mobility.

OLS Second Assessment

The second assessment is mandatory for students who complete the first assessment. The second assessment is linked to the original assessment licence and is automatically issued when the student reaches the end of their mobility (using the duration student's record in their profile).

The beneficiary will be notified of the assessment results by the service provider.

OLS assessment for multiple mobilities

Students undertaking multiple mobilities in the same language must complete the OLS assessment for each mobility, regardless whether the student has previously completed the OLS language assessment in the same language for a previous mobility. For instance, if a student undertakes a mobility in French and completes the OLS assessment and then undertakes another mobility in French they must complete the OLS assessment again.

OLS Course

Participants must have taken an OLS assessment before they can be awarded a licence to follow an OLS language course. Licences for OLS language courses must be awarded to all participants willing to follow the course and according to the participant's linguistic needs.

The OLS course is aimed at various levels of proficiency. It is more beneficial to beginners and intermediates but there are sections for those with a better knowledge of the host language.

Students obtaining a result between levels A1 and B1 in their first assessment are automatically allocated a language course licence. Mobility participants with a level of B2 or higher at the first language assessment in their main language or instruction or work have the opportunity to follow an OLS language course either in that language or in the local language or the country, provided it is available in the OLS. It is up to the sending institution or the beneficiary to indicate this choice in the OLS. Erasmus+ mobility participants, for all types of mobility, who scored C2 in their first language assessment, will not have to take a final language assessment. This rule applies to all ongoing and future Erasmus+ mobilities.

Mobility participants commit themselves by signing the individual mobility grant agreement to complete both OLS language assessments and to follow the OLS language course, if awarded.

OLS language course licences must be used in the period between the OLS first and second language assessments, before and during the mobility activity of the participants concerned.

Expired and unused Licences

If a student misses the deadline of any licences allocated, assessment or course, they will appear in the 'Expired Licences' tab. If they have not been activated, you can resend the licence. The unused licence will be returned to your institution's allocation.

If a licence is activated but expires, a new licence will need to be allocated using an alternative email address.

In case of unused or non-allocated licences at the time of interim and final beneficiary report, the NA may decide to take this into account for the allocation of the number of licences awarded to the beneficiary in the subsequent call years.

Using the OLS System

For beneficiary and / or mobility participant user guides, promotional and other materials visit the [OLS website](#).

OLS for refugees

OLS is available to refugees until November 2019 when this initiative ends. This includes individuals who already obtained refugee status after asylum application, who received a positive asylum decision regarding refugee status or a positive asylum decision with temporary/subsidiary protection or humanitarian protection and asylum applicants. Beneficiaries can request a number of OLS licences for refugees from the UK NA and allocate them on a voluntary basis. The beneficiary must report on the usage of these licences in the final report. For more information visit the [OLS for refugees](#).

For more information on OLS, please refer to your Grant Agreement, Annex III – Financial and Contractual Rules, Article D.

5.2. Mobility Tool+ (MT+)

At the earliest once the participants are selected, the beneficiary organisation must encode general information regarding the participant and the type of mobility activity s/he will carry out (e.g. participant name, destination, duration of the mobility, etc.) into Mobility Tool+. The beneficiary organisation is also responsible for updating the Mobility Tool+ at least once a month during the lifetime of the mobility project with any new information regarding the participants and the mobility activities.

Mobility Tool+ will support the beneficiary in the management of the Erasmus+ mobility activities. Beneficiaries will be able to generate prefilled reports from Mobility Tool+ based on the information they have provided. Mobility Tool+ will also generate reports to be filled in by the participants in mobility activities.

For more guidance on this tool please read this [MT+ Guidance for Beneficiaries](#).

5.3. Participant Portal (PP)

The [Participant Portal](#) is your entry point for the electronic administration of EU-funded projects under programmes, such as Erasmus+. It is open to beneficiaries managing their EU grants to view and edit their organisational data, such as bank details or LEAR (Legal Entity Appointed Representative). A LEAR can, for example, be an administrative staff with access/rights to keep the PP up to date, so please do not mistake this with Legal Representative.

When the contact person leaves the organisation without appointing another person, the access to update the PIC is lost. An organization can always request a password reset; however this only works when the person forgets the password. If the person left the organisation, in most cases, the organisation does not have access to the email address any longer so a password reset will not help. Therefore, it is recommended for each organisation to have at least two people with access to PIC to ensure there is a backup.

For more information please visit this [Participant Portal User Manual](#).

5.4. Project Result Platform (PRP)

Dissemination and exploitation of results are crucial areas of the Erasmus+ project lifecycle. They give participating organisations the opportunity to communicate and share outcomes and deliverables, thus extending the impact of their projects, improving their sustainability and justifying the European added value of Erasmus+. In order to successfully disseminate and exploit project results, organisations involved in Erasmus+ projects are asked to give the necessary thought to dissemination and exploitation activities when designing and implementing their project. The level and intensity of such activities should be proportional to the objectives, the scope and the targets of the different Actions of Erasmus+.

KA103 beneficiaries may use the Erasmus+ Project Results Platform to disseminate project results.

6. Student mobilities - study

6.1. Eligibility

To be eligible, students must be:

- formally registered at a UK HEI (which holds an ECHE) and undertaking higher education studies leading to a recognised degree or other recognised tertiary level qualification, up to and including the level of doctorate; or
- be enrolled in short-cycle higher vocational education⁴ (in the UK this includes Foundation Degree and HND courses) at an HEI which holds an ECHE.

Students undertaking study mobility at undergraduate level must be enrolled at least in the second year of higher education.

Part time students are eligible to participate in Erasmus+ providing they study full time during their mobility period.

6.2. Eligible Student Study Activity

Grants for study can be awarded only for full time undergraduate or postgraduate study mobilities, including thesis preparation (but excluding research activities not specifically forming part of a course of studies), leading to a recognised diploma or degree, at a partner HEI in a programme country holding an ECHE.

PhD students may receive an Erasmus+ grant for study provided that their work is in a partner HEI with which their home institution has an Inter-Institutional Agreement and any research or other activity which contributes directly to the PhD.

⁴ Defined as post compulsory education but sub bachelor level courses which lead to the award of a 'degree' after 18 months/two years; vocationally oriented courses taken after completion of secondary education and leading to a degree on completion of two years (sometimes 1.5 years) study. This corresponds to the short cycle qualifications – approximately 120 ECTS – as described in the Framework for Qualifications of the European Higher Education Area.

6.3. Duration of Study Mobility

Erasmus+ mobility for study must be between a minimum of three months (or one academic term or trimester) and a maximum of 12 months, per cycle. In one-cycle study programmes, such as medicine, students can be mobile for up to 24 months.

The duration should be based on full months of 30 days (regardless of whether the months are of 28, 29, 30 or 31 days), plus any remaining days. A year is considered as 360 days.

For students, the duration is calculated from the first day the student is required to be at their place of study. The end date is the last date they need to be present and may not be the actual date of departure. If the student selects to leave after the date they are required to be present, the sending organisation should only fund the student until the last date they are required to be present.

As stated in the Grant Agreement's Financial and Contractual Rules, without prejudice of the respect of the minimum eligible duration, if the confirmed period of stay is shorter than the one indicated in the grant agreement, the beneficiary will act as follows:

- If the difference between the confirmed period and the one indicated in the grant agreement is more than 5 days, the beneficiary must update this in Mobility Tool+ by indicating the confirmed period (i.e. the start date and end dates notified in the Transcript of Records or Traineeship Certificate) and the grant will be recalculated.
- On the contrary, if the difference is 5 days or less, the beneficiary must maintain in Mobility Tool+ the period indicated in the grant agreement (i.e. the grant is not recalculated).

Prolongation of students' mobility

An extension to the original mobility period may be agreed between the home HEI and the host as long as the following conditions are met:

- The request for extension of the mobility period must be asked for at least **one month** before the end of the mobility period initially planned.
- The extension must immediately follow after the current mobility period. There should be no gaps and the extension will need to be agreed by all parties in writing.

Important note: No student mobility period, including any extension granted, will be funded for more than 12 months.

6.4. ISCED 2013 Codes

For any subject area within Erasmus+, ISCED 2013 codes must be used. The ISCED codes were reclassified in 2013 and provide subject areas for broad, narrow and detailed fields. For further information, please see the [UNESCO ISCED 2013 manual](#) and [EC ISCED code finder tool](#).

Not further defined and not elsewhere classified

If there is no further information about the subject area then it can be classed as '*not further defined*' and one or more '0' is added to the end of the code. For example a programme in Engineering should be classified as 0710 Engineering and engineering trade.

If the subject information is provided, but a suitable ISCED code is not provided, then it can be classed as 'not elsewhere classified' and a '9' are to be added to the end of the code. For example, a new subject within ICT should be classified as 0619 'ICT not elsewhere classified'.

6.5. Recognition

Only periods of study which are part of the student's curriculum are eligible. The HEI must be satisfied that the study is integrated into the student's current degree course and how the study will be formally recognised as part of their degree.

Full recognition must be awarded, preferably using ECTS credits. The means of recognition must be included in the mobility agreement, for more information see:

http://ec.europa.eu/education/tools/ects_en.htm.

We would recommend looking at page 3 of the ECHE annotated guidelines which you can find [here](#).

EuroPass is also an acceptable way in which to provide recognition. For more information, please see the EuroPass [website](#).

Upon satisfactory completion of the mobility period, the host HEI must provide the student with a Transcript of Records completed in accordance with the Learning Agreement. The receiving institution should send the Transcript of Records to the student and the sending institution within five weeks after publication / proclamation of the student's results.

Credit / recognition of the studies undertaken by the student at the host HEI may be withheld only if the student fails to achieve the level of academic attainment required by the host HEI, or if they fail to satisfy the agreed conditions required by the participating HEIs for recognition. It is at the HEI's discretion whether to report a mobility (and allow the student to keep the grant) if a student has completed the minimum duration required but does not gain all the planned credits for the mobility.

6.6. Student Mobility Grants for Study

Grants are a contribution towards the costs of the planned Erasmus+ mobility period. The grant rate is set at the beginning of the year and will not change. All students should be paid at the appropriate rate.

The HEI must make a first payment of between 70% and 100% of the grant specified in the agreement within 30 days of signature of the student Grant Agreement by both parties and no later than receipt of confirmation that the student has arrived at the host institution. This is specified in the Student Grant Agreement, available in the Agreements section of the Erasmus+ [website](#).

Eligible students will be awarded the grant as indicated in the table below:

Country	Student study mobility	
	Monthly grant	Monthly supplement for students from disadvantaged backgrounds
Group 1 countries (high cost of living) Denmark, Iceland, Ireland, Finland, Sweden, United Kingdom, Liechtenstein, Luxembourg, Norway	€420	€ 120
Group 2 countries (medium cost of living) Austria, Belgium, Germany, France, Italy, Greece, Spain, Cyprus, Netherlands, Malta, Portugal	€370	
Group 3 countries (low cost of living) Czech Republic, Bulgaria, Croatia, Estonia, Latvia, Lithuania, Hungary, Poland, Romania, Serbia, Slovakia, Slovenia, former Yugoslav Republic of Macedonia, Turkey		

Student mobility for studies for students from outermost Programme Countries and regions and Overseas Countries and Territories		
Mobility from	To	Amount
Outermost regions, Cyprus, Iceland and Malta, Overseas Countries and Territories	Group 1 countries	770 EUR per month
	Group 2 countries	720 EUR per month
	Group 3 countries	670 EUR per month

7. Student Mobility - traineeship

Traineeships are defined as a period of time a student spends in an enterprise or organisation in another country, with a view to acquiring specific competences that are required by the labour market, which is relevant to the student's higher education. Traineeships are for those students enrolled in a HEI at Short, First (Bachelor or equivalent) and second-cycle (Master or equivalent) as well as Doctoral candidates.

For a list of eligible / ineligible organisations please see page 36 of the [2019 programme guide](#).

7.1. Eligible Student Traineeship Activity

There are three different provisions for traineeships:

1. Traineeships embedded in the curriculum (counting towards the degree);
2. Voluntary traineeships (not obligatory for the degree);
3. Traineeships for recent graduates.

Full time hours are not a mandatory requirement but HEIs are urged to consider the following questions when completing the documentation for the participant if the traineeship is part time:

- What is the relevance and impact of a traineeship with part time hours?
- What are the expected learning outcomes?
- What would be the overall duration of the traineeship and what is the student expected to do outside of the working hours?

If a part time placement is combined with studies, this would seem more relevant. In any case, the validity of a part time placement must be discussed and agreed by the sending institution.

Traineeships in “digital skills”

In order to better support students to acquire the skills necessary for their future, a partnership between the Erasmus+ and Horizon 2020 programmes has been established. This partnership will provide and promote further traineeship opportunities for students and recent graduates who wish to acquire digital skills and competences required to perform jobs and thrive in an economy and society which is being continuously digitally transformed. Students and recent graduates from all disciplines are invited to apply for a traineeship in these domains. These traineeships are expected to take place in the EU Member States as well as in Horizon 2020 associated countries.

Any traineeship will be considered as a “traineeship in digital skills” when one or more of the following activities are practiced by the trainee: digital marketing (e.g. social media management, web analytics); digital graphical, mechanical or architectural design; development of apps, software, scripts, or websites; installation, maintenance and management of IT systems and networks; cybersecurity; data analytics, mining and visualisation; programming and training of robots and artificial intelligence applications. Generic customer support, order fulfilment, data entry or office tasks are not considered in this category.

Please make sure that these are recorded on Mobility Tool+ by ticking the box on the student record for Digital Traineeships.

7.2. Duration of Student Traineeships

Erasmus+ traineeships must be between two and 12 months per cycle, excluding travel time. In one-cycle study programmes, such as medicine, students can be mobile for up to 24 months.

The duration of a traineeship by recent graduates counts towards the 12 months maximum of the cycle during which they applied for.

The duration should be based on full months of 30 days (regardless of whether the months are of 28, 29, 30 or 31 days), plus any remaining days. A year is considered as 360 days.

The duration of a placement is calculated from the first day the student is required to be at their place of study. The end date is the last date they need to be present and may not be the actual date of departure.

7.3. Recognition

The home HEI must give full recognition for traineeships undertaken during a degree course. For traineeships which are part of the student's curriculum, full recognition must be awarded wherever possible by using [ECTS credits](#). Please visit [EC Traineeships website](#) for further information.

In the case of a traineeship that is not part of the curriculum of the student, the HEI must provide recognition at least by recording the traineeship in the Diploma Supplement.

After the mobility, the receiving organisation / enterprise should send a transcript of records to the trainee and sending institution.

Students must complete their placements to the standards of the host organisation in order for it to be fully recognised. If a student does not fulfil these requirements, the HEI may use their discretion as to whether to count the mobility and allow the student to keep the grant.

See also the [EuroPass website](#).

7.4. Recent Graduate Traineeships

Graduate traineeships must be selected by the home HEI, with evidence of the students' selection during the student's final year of studies. A student must carry out and complete their traineeship abroad within one year of their graduation. The student's documentation can be completed after the student has graduated, but this can increase the risk to the HEI.

The students complete the same documentation as enrolled students undertaking traineeship mobility. The home HEI remains responsible for the student's grant, and for ensuring all paperwork is completed, including evidence of the duration of the mobility.

Recent Graduates are able to undertake more than one traineeship, providing each mobility meets the minimum duration of two months, the 12 month per cycle quota is not exceeded and the added value of having different receiving organisations is clearly demonstrated. Traineeships undertaken after the student has graduated do not need to be recognised as the aim of these is to improve the student's employability.

7.5. Student Mobility Grants for Traineeships

Student grants for traineeships are a flat rate grant calculated at a monthly rate. Grants are a contribution towards the costs of the planned Erasmus+ mobility period. Eligible students will be awarded the grant as indicated in the following table.

Please note in the table below:

- Country bands;
- Higher rates to be paid for traineeships

Country	Student traineeship	
	Monthly grant	Monthly grant (disadvantaged background)
Group 1 countries (high cost of living) Denmark, Iceland, Ireland, Finland, Sweden, United Kingdom, Liechtenstein, Luxembourg, Norway	€520 (€420 + €100 traineeship monthly top up)	€540 (€420 + €120 disadvantaged background top up)
Group 2 countries (medium cost of living) Austria, Belgium, Germany, France, Italy, Greece, Spain, Cyprus, Netherlands, Malta, Portugal	€470 (€370 + €100 traineeship monthly top up)	€490 (€370 + €120 disadvantaged background top up)
Group 3 Countries (low cost of living) Czech Republic, Bulgaria, Croatia, Estonia, Latvia, Lithuania, Hungary, Poland, Romania, Serbia, Slovakia, Slovenia, former Yugoslav Republic of Macedonia, Turkey		

Students from disadvantaged backgrounds who take part in traineeships are entitled to receive the top-up for students from disadvantaged backgrounds instead of the top-ups for traineeships, in case the top-up for traineeships is lower.

7.6. Erasmus Intern

The Erasmus Student Network has created an online platform for traineeship providers to advertise their available traineeships. Students are able to browse, contact traineeship providers, apply for traineeships and they can also advertise themselves and their traineeship interests.

The online platform can be found here: <http://erasmusintern.org>

7.7. British Council Language Assistants

Students carrying out a Language Assistantship may receive a grant for an Erasmus+ traineeship providing they meet all Erasmus+ eligibility criteria and that all Erasmus+ procedures are followed. Documentary and reporting requirements are the same as for all Erasmus+ students.

[British Council Language Assistants](#) are subject to the same rules as any Erasmus+ student with regard to tuition fees and the tuition fee contribution.

Please note that the British Council Language Assistants scheme and Erasmus+ have separate procedures, both of which must be followed.

If an Erasmus+ student is participating in the Language Assistants programme and are working at more than one school, the main school or where they spend the majority of their time should complete the documentation for the student.

7.8. IAESTE

Outgoing students who have a placement under [IAESTE](#) are eligible for an Erasmus+ grant provided that the placement fulfils all criteria for an Erasmus+ placement. Documentary and reporting requirements are the same as for all other Erasmus+ students.

8. Staff Mobility

Erasmus+ staff mobility can be undertaken by both teaching and administrative staff. To be eligible, they must hold a contract of employment with the sending HEI.

Staff mobility is expected to contribute to the overall priorities of Erasmus+, the EU Agenda for Modernisation of Higher Education and the individual HEI's international strategy, as summarised in the ECHE. Staff mobility is therefore not solely intended to be for the benefit or career development of the individual member of staff.

8.1. Duration

Mobility for staff teaching and staff training may be from **two days** to **two months**, excluding travel time. For teaching mobilities, the activity must comprise a minimum of 8 hours of teaching per week (or any shorter period of stay). If the mobility lasts longer than one week, the minimum number of teaching hours for an incomplete week should be proportional to the duration of that week.

In case of invited staff from enterprises, the minimum duration for mobility is 1 day. There is no minimum number of teaching hours for invited staff from enterprises.

8.2. Recognition of Staff Mobility

HEIs must recognise staff mobility assignments, as described in the ECHE and in the Agreement with the staff member. The staff member should disseminate learning to their colleagues at the appropriate level in line with requirements for dissemination of outcomes of activity (see pages 308 – 311 of the [2019 Programme Guide](#)).

8.3. Staff Mobility – Teaching

Teaching staff employed by a HEI holding an ECHE may undertake Erasmus+ staff mobility for teaching. The teaching period must be in a partner HEI, which must hold ECHE accreditation and an Inter-Institutional Agreement must be in place with the staff member's home HEI.

Prior to departure, the home and host HEIs or host organisation must formally agree the teaching programme, using the Staff Mobility Agreement. This can be completed electronically. Any amendments must also be agreed in writing and retained.

There must be documentary evidence of the duration of the mobility period signed by the host organisation. At the end of a teaching period abroad the host HEI must confirm the activity undertaken along with the start and end dates. Failure to provide this may result in recovery of the grant in the event of an audit.

8.4. Staff Mobility – Training

Erasmus+ training periods support the professional development of HEI teaching and non-teaching staff, as well as the development of involved institutions. Teaching and non-teaching staff, including administrative and other staff, employed by an HEI holding Erasmus+ ECHE accreditation may undertake Erasmus+ mobility for training. The training period may be in another HEI or any other appropriate organisation. A host HEI for staff training does not need to have an Inter-Institutional Agreement with the home HEI.

Training events abroad may be in the form of job shadowing, observation, attendance at workshops or courses etc. This may be for transfer of knowledge and good practice, to learn from shared experience, acquire practical skills or to discover new ideas for teaching and learning.

Important note: Attendance to a conference is not funded under Erasmus+ Key Action 1.

Prior to departure, the full training programme must be agreed formally by the home and host HEI or enterprise, by exchange of letters or electronically. Minimum requirements for the training programme are in the Staff Mobility Agreement. Evidence must be kept that this has been agreed prior to departure, and any amendment must also be formally agreed and retained. Changes may be communicated electronically.

The European Commission have created a website detailing the staff training opportunities, such as International Weeks. You can find the website [here](#).

8.5. Staff Mobility - Combined

Staff can participate in mobilities that combine both teaching and training.

For a staff member undertaking a teaching activity combined with a training mobility during a single period abroad, **the minimum number of hours of teaching per week is reduced to 4 hours**. If the mobility lasts longer than one week, the minimum number of teaching hours for an incomplete week should be proportional to the duration of that week.

If the staff member wishes to combine teaching and training in one mobility at the same institution, the staff member submits a single application to their home institution. The staff member will also be required to submit only one Mobility Agreement. Information regarding the training period can be easily added to the Mobility Agreement for Staff Teaching.

The sending institution would then report the single mobility on the Mobility Tool+ **as a teaching mobility** but will select the “Combined Teaching and Training”. In addition to selecting this option, the beneficiary should enter the name of the organisation providing the training activities, its location and the duration of the training in the field "Mobility Comments".

If there are two different receiving institutions, the approach depends on how far from one another they are located. If there is less than 100km between the two receiving institutions, the two activities can be considered as one combined mobility.

If there is more than 100km between the two receiving institutions, the activities should be considered as two different mobilities and not a combined one. There will be two mobility agreements and two Grant Agreements.

8.6. Invited staff from an enterprise/organisation

HEIs are allowed to invite staff from an enterprise / organisation to come to their university to deliver teaching or training. The invited staff member signs the mobility agreement with the host UK HEI and may be paid a grant by the host HEI. In the event of an audit, there must be evidence of the activity signed by the host, as with staff mobility.

In case of invited staff from enterprises, the minimum duration for mobility is 1 day. There is no minimum number of teaching hours for invited staff from enterprises.

HEIs receive OS funding for invited staff from other types of organisation as it is still considered as a mobility. To attract OS funding, the HEI needs to be able to provide evidence that the invited staff have participated. Please see page 38 - 39 of the [2019 Programme Guide](#) for further information.

8.7. Staff Mobility - Grants

Mobility grants for staff are provided as contributions towards subsistence and travel. Staff subsistence and travel costs are paid as flat rates, regardless if your institution pays receipted expenditure. Travel days are not included in the calculation of the minimum duration.

A HEI can award funding for up to 2 travel days. A travel day is a day's subsistence for the staff member traveling before and/or after participating in teaching or training activities. If the staff member is participating in teaching or training activities on the same day as travelling, they are not entitled to a travel day.

HEIs choose how to pay staff subsistence and travel grants. For example, HEIs may choose to pay against receipted expenditure, at rates to be decided by the HEI or at the rates given below, on condition that the payment does not exceed the maximum defined in the table. The NA will audit the activity, but not actual expenditure.

Individual Support for Staff from Programme Countries	
Receiving Country	Amount per day in EUR
Group 1 countries (high cost of living) Denmark, Iceland, Ireland, Finland, Sweden, United Kingdom, Liechtenstein, Luxembourg, Norway	€180
Group 2 countries (medium cost of living) Austria, Belgium, Germany, France, Italy, Greece, Spain, Cyprus, Netherlands, Malta, Portugal	€160
Group 3 countries (low cost of living)	€ 140

Czech Republic, Bulgaria, Croatia, Estonia, Latvia, Lithuania, Hungary, Poland, Romania, Serbia, Slovakia, Slovenia, former Yugoslav Republic of Macedonia, Turkey	
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Up to the 14th day of activity, the amount per day per participant remains as specified in the table above. Between the 15th and 60th day of activity the grant amount per day per participant is 70% of the amount specified in the table above, i.e.:

Receiving Country	Code	1 Day	2 Days	3 Days	4 Days	5 Days	6 Days	7D/1wk	2 Weeks	3 Weeks	4 Weeks	2 Months
Austria	AT	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Belgium	BE	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Bulgaria	BG	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Croatia	HR	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Cyprus	CY	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Czech Republic	CZ	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Denmark	DK	180	360	540	720	900	1080	1,260.00	2520	3402	4536	8316
Estonia	EE	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Finland	FI	180	360	540	720	900	1080	1,260.00	2520	3402	4536	8316
France	FR	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Germany	DE	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Greece	GR	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Hungary	HU	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Iceland	IS	180	360	540	720	900	1080	1,260.00	2520	3402	4536	8316
Ireland	IE	180	360	540	720	900	1080	1,260.00	2520	3402	4536	8316
Italy	IT	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Latvia	LV	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Liechtenstein	LI	180	360	540	720	900	1080	1,260.00	2520	3402	4536	8316
Lithuania	LT	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Luxembourg	LU	180	360	540	720	900	1080	1,260.00	2520	3402	4536	8316
Macedonia	MK	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Malta	MT	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Netherlands	NL	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Norway	NO	180	360	540	720	900	1080	1,260.00	2520	3402	4536	8316
Poland	PL	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Portugal	PT	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Romania	RO	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Serbia	RS	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Slovakia	SK	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Slovenia	SI	140	280	420	560	700	840	980.00	1960	2646	3528	6468
Spain	ES	160	320	480	640	800	960	1,120.00	2240	3024	4032	7392
Sweden	SE	180	360	540	720	900	1080	1,260.00	2520	3402	4536	8316
Turkey	TR	140	280	420	560	700	840	980.00	1960	2646	3528	6468
UK	UK	180	360	540	720	900	1080	1,260.00	2520	3402	4536	8316

Up to the 14th day, the daily rate is used. Between the 15th and the 60th day, 70% of the daily rate is used per day. 2 months is 60 days.

8.8. Travel Grants

Staff travel grants are paid according to distance travelled, at the following rates:

For travel distances between 10 and 99 KM:	20 EUR per participant
For travel distances between 100 and 499 KM:	180 EUR per participant
For travel distances between 500 and 1999 KM:	275 EUR per participant
For travel distances between 2000 and 2999 KM:	360 EUR per participant
For travel distances between 3000 and 3999 KM:	530 EUR per participant
For travel distances between 4000 and 7999 KM:	820 EUR per participant
For travel distances of 8000 KM or more:	1500 EUR per participant

To calculate distance, the HEI must use the [EC distance calculator](#).

8.9. Top Up for Expensive Travel

Only participants eligible for a standard travel grant are eligible for exceptional costs for expensive travel:

Exceptional travel costs of participants are claimed under the budget category "exceptional costs" (up to a maximum of 80% of travel costs). This is allowed provided that applicants can justify that the standard funding rules (based on unit costs per travel distance band) do not cover at least 70% of the travel costs of participants.

In other words, the EU Travel Grant is calculated based on the distance band and activity type selected. The grant for Exceptional Costs for Expensive Travel can be requested only if the standard travel grant based on unit cost per distance band (EU Travel Grant) does not cover at least 70% of actual travel costs.

For processing in Mobility Tool+; in cases where the EU Travel Grant is under 70% of the real travel costs, the check box for Request Exceptional Costs for Expensive Travel should be ticked. Ticking this box will automatically set the field EU Travel Grant to zero euros. You should then enter the Real Travel Cost and up to 80% of the real travel cost can be indicated as Exceptional Costs for Expensive Travel (or eligible cost for the EU grant).

Both EU Travel Grant and Exceptional Costs for Expensive Travel cannot be used for the same mobility (they are mutually exclusive).

The top up for expensive travel costs is an additional support for staff traveling to remote areas. Remote areas should be understood as the places that are difficult to reach, for example: mountain areas, islands or isolated towns where there is a significantly limited availability of highways, railways, or bus lines. The hub/bus/train station does not need to be located in the country of the sending/receiving organisation. In some cases, travels between neighbouring countries to reach a hub might be necessary to ensure fairer costs.

In cases where staff members require a top up grant for expensive domestic travel, HEIs must provide the UK NA with an overview of the planned itinerary (as in table above). The UK NA will then provide a rejection or a conditional acceptance of the top-up request before the mobility period.

All requests for a top up grant for expensive domestic travel should be indicated on the Mobility Tool+ for the relevant mobilities by final report stage.

Important note: Any approved requests for top-ups for expensive travel before mobility are conditional on the HEI being able to submit clear and detailed justification at final report stage, by describing the real itinerary followed.

8.10. Calculating Travel

By default, the place of origin is understood as the place where the sending organisation is located and the place of the venue as the place where the receiving organisation is located. If a different place of origin or venue is reported, the beneficiary must provide the reason for this difference.

In case no travel took place or it was funded from other EU sources than the Erasmus+ Programme (e.g. a mobility participant is already at the place of the venue in relation to another activity than the one funded from the Agreement), the beneficiary must report that situation accordingly in Mobility Tool+ for each mobility concerned. In this case, no grant support for travel will be awarded.

If a staff member undertakes two separate mobilities in two different countries (e.g. France and Spain) without returning to the home location, the travel for the first mobility is calculated based on the distance between the home location and the first mobility location (e.g. France). The travel grant for the second mobility is based on the distance between the location of the first mobility and the second (e.g. France to Spain). An explanation in Mobility Tool+ should be added in the field "Comments for a different location" to justify that a different distance band is used.

If a staff member is already abroad on a non-Erasmus+ activity in a programme country and wishes to undertake a mobility in another programme country, the distance should be calculated from the real place of departure to the location of the activity.

For a staff member undertaking consecutive mobilities within the same country, the travel distance calculated depends on how far the receiving institutions are from one another. If there is less than 100km between the two receiving institutions, the activities may be considered as one combined mobility. If there is more than 100km between the two receiving institutions, the activities are separate mobilities and the travel for the second mobility should be calculated from the first receiving institution to the second.

8.11. Proof of payment

All payments made as a result of Erasmus+ funding may be subject to audit by the NA or other bodies. If there is an audit, the NA will ask for evidence that the grant has left the HEI's bank account or have been received by a staff member. Failure to provide this may result in the NA recovering the grant.

9. Budget management

9.1. Budget Transfers

Information regarding budget transfers can be found in Article I.3.3. of the 2019 Grant Agreement – Special Conditions. The beneficiary is allowed to transfer:

- Up to 100% of the funds allocated for organisational support to any other budget categories.
- Up to 100% of the funds between any of the budget categories of student mobility.
- Up to 100% of the funds between any of the budget categories of staff mobility.
- Up to 100% of the funds from any of the budget categories of staff mobility to any of the budget categories of student mobility.

9.2. Organisational Support (OS)

For Key Action 103 projects, all HEIs/consortia who have received grants will receive a grant for Organisational Support (OS). OS is based on the total number of mobilities, including staff, students and invited staff from enterprises or other organisations. The OS grant rates are:

- €350 (per participant) for up to 100 participants;
- €200 per any additional participants (for 101 participants and above).

OS funding is included in the 70% initial pre-financing payment, based on the numbers of mobilities in the Grant Agreement.

If the final outgoing student and staff mobility numbers are below the final reported mobility numbers then the HEI may be asked to refund part of the OS funding. A margin of 10% is allowed, so that if the number of mobilities drops by up to 10%, OS will remain the same. However, OS will not exceed the maximum in the Grant Agreement. If there is no outgoing mobility or invited staff from an enterprise in the project, the final OS grant will be zero.

Important note: Zero grant students will be included in the calculation of the OS grant.

Eligible OS activity

The HEI may decide how the OS grant is to be used, provided it is used on activities related to the Erasmus+ HE mobility and that the HEI observes the EC and NA's rules as stated in the Grant Agreement and the [2019 Programme Guide](#).

OS is a contribution to any cost incurred by the HEI in supporting student and staff mobility, both incoming and outgoing, in order to comply with the quality commitments in the ECHE, for example:

- organisational arrangements with partner institutions, including visits to potential partners, to agree on the terms of the inter-institutional agreements for the selection, preparation, reception and integration of mobile participants; and to keep these inter-institutional agreements updated;

- provide updated course catalogues for international students;
- provide information and assistance to students and staff;
- selection of students and staff;
- preparation of the learning agreements to ensure full recognition of the students' educational components; preparation and recognition of mobility agreements for staff;
- linguistic and intercultural preparation provided to both incoming and outbound students and staff, complementary to the Erasmus+ Online Linguistic Support;
- facilitate the integration of incoming mobile participants in the HEI;
- ensure an efficient mentoring and supervision arrangements of mobile participants;
- specific arrangements to ensure the quality of student traineeships in enterprises;
- ensure recognition of the educational components and related credits, issuing transcript of records and diploma supplements;
- support the reintegration of mobile participants and build on their acquired new competences for the benefit of the HEI and peers.

For more information visit pages 43 - 44 of the [2019 Programme Guide](#).

Using OS for insurance and visas

Insurance and visa costs for participants can be covered by OS. The sending HEI must verify that outgoing students are informed in advance about the situation in the host country in terms of insurance and have sufficient insurance coverage. For student traineeships, normally it is the receiving organisations responsibility to provide insurance or cover the cost of insurance. However, if it is not possible, it is up to the sending institution to determine whether the cost of insurance can be covered by OS funds.

For further information about insurance please see page 10 of the [2019 Programme Guide](#).

The HEI should report mobilities where the students received no funding (zero grant). HEIs should also report all months of mobilities which have received partial funding. The period that will be covered by funding must meet the minimum duration required, e.g. for a 6-month study mobility, at least the 3 months minimum duration must be funded. The entire mobility duration should be reported and any duration that does not receive mobility funding should be reported in days in the 'non-funded duration days' field.

Important note: For students, any months at zero grant count towards the maximum 12 months Erasmus+ participation in any one cycle.

9.3. Additional Support for Students and Staff

The HEI should ensure that staff and students considering participation in an Erasmus+ activity and planning their mobility are aware that they can apply for extra funding if they have special needs which will incur extra costs.

Students or staff should apply for the additional funding via their home HEI before the start of the mobility. Individuals risk funds not being available if they apply after they have started their mobility and the lateness of any such application submission must be justified by the managing HEI.

The sending HEI is responsible for ensuring that application forms are correctly completed and for providing evidence to the host organisation regarding the special needs of the individual. Sending HEIs must ensure that arrangements are being made at the host organisation to meet the participant's needs.

The application must include a statement from a doctor or other authority confirming the special needs, its severity, the impact on the Erasmus+ mobility, any additional requirements and additional costs that need to be met. A detailed estimate of costs is required.

The application should provide information on any other sources of financial support that the student/staff member receives and why this is insufficient to cover the extra costs.

If the application is approved, the NA will specify a maximum supplementary allowance. On completion of the Erasmus+ period a final report of expenditure will be required. If the expenditure is less than the approved maximum, a recovery order will be raised, and the difference must be repaid to the NA.

Students/staff should apply for additional funding via the home HEI before the start of the mobility and the application needs to be submitted to the NA by the HEI's Erasmus coordinator.

If additional support funding has been approved by the UK NA (not earlier), please tick the box 'Participant with Special Needs' in the participant's mobility record in MT+.

For further information please see the "Additional Support (Disability & Special Needs)" section in the [Manage your Grant](#) website.

9.4. Zero Grant Participants

Zero grant participants may undertake Erasmus+ mobility at the discretion of the HEI. The participants must fulfil all Erasmus+ criteria but they receive no Erasmus+ mobility grant. In addition, the HEI may choose not to fund part of a student study/traineeship or staff teaching/training mobility.

10. Reporting

The HEI must show that reported activities have taken place but is not required to show details of each item of expenditure (though thorough records should be kept at all times to allow for the possibility of being selected for audit).

You can find more information in Annex III – Financial and Contractual rules which details the types of documentation that are acceptable

10.1. Reporting deadlines from the HEI to the NA

Type of report	Period covered	Date due
To be completed by HEI for 16-month and 24-month agreements		

Interim Report – study Interim Report – placement	Contracted period; to include all confirmed and projected students/staff	30.03.2020
Interim Report – teaching Interim Report – training		30.03.2020
To be completed by HEI for 16-month agreements		
Beneficiary Final Report and mobility data	Narrative report to demonstrate the qualitative and quantitative aspects of the project.	60 days after the project end date. (29.11.2020)
To be completed by HEI for 24-month agreements		
Beneficiary Final Report and mobility data	Narrative report to demonstrate the qualitative and quantitative aspects of the project.	60 days after the project end date. (30.07.2021)

10.2. Interim Report

All HEIs are required to submit an ‘Interim Report’ during the lifetime of their project and by no later than **30 March 2020**.

For this report you would need to ensure that **all mobilities that have taken place, as well as those that are yet to take place until the end date of the project**, are recorded on Mobility Tool+.

You will be required to download a pdf of the budget. The budget can be downloaded by going to the Budget tab and clicking ‘Export PDF’.

This PDF must be sent via email to the [Erasmus+ Grants team](#) by **30 March 2020**.

Whilst the MT+ remains open for use, we request that no changes are made to your project during April 2020 when the UK NA conducts analysis of your project data.

Interim report outcome

In so far as the interim report demonstrates that at least 70% of the first pre-financing payment has been used, the interim report will be considered as a request for a further pre-financing payment of up to 30%.

Where the interim report shows that less than 70% of the first pre-financing payment has been used, the beneficiary must submit a further interim report once at least 70% of the amount of the first pre-financing payment has been used, which will be considered as a request for a further pre-financing payment of 30%.

Where the interim report shows that the beneficiary will not be able to use the maximum grant amount as specified in Article I.3.1, the NA will issue an amendment reducing the maximum grant amount accordingly and, in case the reduced maximum grant amount is less than the amount of pre-financing payment, recover the excess amount from the beneficiary.

Following approval of the report, UK NA will pay to the beneficiary the further pre-financing payment within 60 days from the reporting deadline so long as your project has spent 70% of its initial pre-financing payment, provided that all interim reports were submitted in a timely fashion and by no later than 30/3/2019.

Regular (monthly) updating of MT+ and reporting by set deadlines are contractual obligations.

Prior to the interim report deadline, the UK National Agency reviews the MT+ to determine the extent to which beneficiaries completed their interim reports ahead of the reporting deadline and to determine the most appropriate cause of action.

10.3. Final Report

All HEIs are required to submit a final report via the Mobility Tool+ at the end of every project. The report will include a narrative report to demonstrate the qualitative aspects of the project implementation in addition to the quantitative data. **The final report must be submitted within 60 days of the project end date (which can be found in Article I.2.2 of the Grant Agreement). The Mobility Tool+ remains fully open during the reporting period, however, no changes to project records in the MT+ will be possible past the final report deadline.**

The final report is considered as the beneficiary's request for **payment of the balance** of the grant:

The payment of the balance reimburses or covers the remaining part of the eligible costs incurred by the beneficiary for the implementation of the project. The NA determines the amount due as the balance by deducting the total amount of pre-financing already made from the final amount of the grant.

If the total amount of earlier payments is greater than the final amount of the grant determined in accordance with the Grant Agreement, the payment of the balance takes the form of a recovery.

If the total amount of earlier payments is lower than the final amount of the grant determined in accordance with the Grant Agreement, the NA must pay the balance within **60 calendar days** from when it receives the documents as specified in the Grant Agreement.

Payment following a report is subject to the approval of the request for payment of the balance and of the accompanying documents. Their approval does not imply recognition of the compliance, authenticity, completeness or correctness of their content. The amount to be paid may, however, be offset, without the beneficiary's consent, against any other amount owed by the beneficiary to the NA, up to the maximum amount of the grant.

For more information please refer to your Grant Agreement – Special Conditions.

Scoring of the Beneficiary Final Report

The narrative final beneficiary reports will be assessed by experts who have completed relevant assessor training and in line with the EC's 2019 Erasmus+ Assessment criteria for final beneficiary report guidelines. The maximum number of points that can be awarded is 100. Projects that are awarded over 75 points are considered very good to excellent and the results should be disseminated more widely.

Projects awarded between 50 to 75 points are considered average to good. If a project is awarded below 50 points, there is serious cause for concern in relation to compliance with the ECHE and/or other implementation issues. Consequences of low scores are set out in the Grant Agreement, Annex III. For KA103 projects, the award of a score lower than 50 can have serious implications for continued compliance with the ECHE.

11. National Agency Monitoring Activities

The UK NA and the Commission will monitor the correct implementation of the Erasmus Charter for Higher Education (ECHE) by the beneficiary. In case the monitoring reveals areas for improvement, the beneficiary must establish and implement an action plan within the timeframe specified by the NA or the Commission. In the absence of adequate and timely remedial actions by the beneficiary, the NA may recommend to the European Commission to suspend or withdraw the Erasmus Charter for Higher Education in accordance with the provisions set in the Charter.

The UK NA is also required under its contract with the EC to undertake monitoring activities, audits and checks on a representative sample of organisations each year. The checks vary in scope and depth according to the type of check performed. These checks are carried out to ensure that the management of the Erasmus+ Programme is satisfactory and within the terms of the grant agreement and programme rules.

Beneficiaries are accountable to the UK NA for the implementation of the project, for the use of funds received and for the amounts paid to participants. Therefore, beneficiaries should ensure that appropriate reporting and monitoring procedures are in place. Project monitoring should involve checking the financial performance and general performance of the project against the objectives set out in the application. Beneficiaries must gather and retain all necessary information and documentary evidence, which demonstrates clear and transparent management of the project as this may be inspected by the EC.

Please refer to Section V.I of Annex III- Financial and Contractual rules

11.1. Documentary Evidence

Please see, Financial and Contractual rules of your Grant Agreement Annex III.I.2 calculation and supporting documents for unit contributions for requirements regarding documentary evidence of mobility.

11.2. Feedback from Audit Visits Carried Out by the NA

At the end of an audit visit the HEI will receive informal feedback. The NA will give formal feedback in the form of a draft visit report, taking into account any initial comments from the HEI, within 30 days of the visit.

The HEI will have 30 days to respond to the draft report during which time the NA may accept missing information or other explanations as necessary. At the end of the 30-day period the NA will issue their final report.

11.3. Repayment of Grant Monies

Following validation of the final report data, and adverse audit findings, the NA will request reimbursement of any funds overpaid or incorrectly reported. The NA will not enter into an agreement for future years with the institution until any outstanding amounts identified are repaid.

11.4. Practicalities for Audit Visits Carried Out by the NA

The Erasmus+ co-ordinators at HEIs selected for visits will be contacted in advance to agree a date and will be advised of areas to be covered. A sample list of mobilities to be examined will normally be given in advance of the visit. To aid the process the HEI should prepare copies of the documentation described in this section as evidence of activity.

11.5. Appeals

If you wish to appeal a decision made by the UK NA in relation to your Erasmus+ application for funding or grant agreement, you must follow the appeals procedure outlined on our website. Please note that you may only appeal if you believe the UK NA has not followed the correct procedures as set out in the relevant Commission Call for Proposals or in the National Agency's own published guidance.

12. Exceptions

If, with good reason, an HEI cannot comply with any EC or NA requirements, they should contact the NA as soon as possible. In all cases, the NA reserves the right not to accept the justification offered.

13. Useful Links

- [UK National Agency website](#)
- [UK National Agency – Manage your grant, HE Projects](#)
- [European Commission Erasmus+ website](#)
- [Erasmus+ National Agencies contact details](#)
- [Mobility Tool+](#)
- [Online Linguistic Support](#)
- [Erasmus Intern website](#)
- [Erasmus Charter for Higher Education \(ECHE\)](#)
- [ECHE Annotated Guidelines](#)
- [Participant Portal](#)
- [England Tuition Fee](#)
- [Wales Tuition Fee](#)
- [Scotland Tuition Fee](#)
- [Northern Ireland Tuition Fee](#)
- [Staff Training Opportunities](#)
- [EC Distance Calculator](#)
- [Mobility Tool+ Guidance](#)
- [EuroPass website](#)
- [Erasmus+ Projects Results Platform](#)

If you have any queries, please do not hesitate to contact the Erasmus+ HE Helpdesk.

Tel: 02920 924311 / Email: Erasmus@britishcouncil.org

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