

In this briefing sheet, detail is provided on the specific areas of the budget that need to be considered, and commented on, when assessing an application for a KA2 Strategic Partnership (all types).

Introduction

Whilst there is no separate award criterion related to budgets or financing, there remains a requirement to review and consider the proposed budget items as a part of assessing the **Quality of Project Design**.

Under this heading (Quality of Project Design), experts are required to confirm that the proposal **provides value-for-money** comparing results planned to the grant requested and that the **grant request is realistic** to support high quality implementation of the project and its activities.

As a part of assessing a project application, experts are required to consider the **appropriateness** and **suitability** of the proposed budget, providing feedback to NA staff, and applicants, along with any recommendations for revision or reduction. Examples of the types of costs that can be funded are provided in this briefing sheet and can also be seen in the Erasmus+ Programme Guide (Version 2, 2018) on pages 120-127.

Where a project is **not expected to be funded**, expert comments should highlight areas of the budget that are unclear or unconvincing, as well as areas for improvement, yet should avoid making reference to specific budget figures, for example:

- “some areas of the budget seem overestimated, in particular costs associated with intellectual outputs, with a need for much greater detail and justification, particularly in terms of forecast staff days” [good example]
- “it is difficult to see how €100,000 can be used to fund intellectual outputs: this needs to be reduced” [bad example]

Where a project has the **potential to be funded** (i.e. all thresholds have been passed), expert comments should be more specific, especially where budget changes are proposed. In all such cases, the National Agency will use these comments to make changes to the budget **prior to making an offer of funding** to the applicant - for example:

- “the budget is well prepared, with a balanced distribution of resources that is generally reflective of the work that is planned; there is one exception, that is Intellectual Output 2, for which the intellectual nature of the output is not convincing and for which the associated costs and deliverables should be removed in full” [good example]
- “some of the activities are not convincing and should be removed or reconsidered” [bad example]

In all cases, comments on budget reductions should also appear in the assessment summary.



Key Action 2:
Strategic
Partnerships

BUDGET
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Budget Headings Not for Review

For KA2 Strategic Partnerships [all types], the budget heading relating to **Project Management and Implementation** is automatically calculated within the online application form, taking into account the number of participating organisations - a maximum organisations of 10 can be funded under this heading although there is no limit to the number of organisations that participate - and the project duration. Experts are **not required to comment** on this budget heading.

Under **Project Management and Implementation**, a variety of processes, activities and outputs are be covered, some management-related, others related to the delivery of overall project goals - for example: project planning; financial management; partner coordination and communication; small-scale materials-development; virtual cooperation; planning and organisation of learning activities; teaching, mentoring and classroom-based project work; and, promotion and dissemination actions, including the development of brochures, leaflets and web-based content.

Budget Headings for Review

Remaining budget headings are to be reviewed with a view to confirming the **appropriateness** and **suitability** of the proposed budget items. In this respect, it is important to consider what the applicant should know - based on information that has been provided to all applicants - and what you, as an assessor, need to consider in your assessment. It is important to remember that some applicants will also provide budget-related explanations within their application. Different types of Strategic Partnership are limited to the budget headings that they can access, with additional references in the tables below.

Budget Heading	What the Applicant Should Know	What the Assessor Should Consider
Transnational Partner Meetings Not available to School Exchange Partnerships.	<ul style="list-style-type: none"> ☞ Grants are paid as a “contribution” to travel and subsistence using the “unit costs” principle for which the European Commission’s Distance Calculator Tool must be used. ☞ Meetings should be aligned with plans for project delivery, as detailed in the application, and should take place in the countries of the participating institutions (or in cities where an EU institution is seated, namely: Brussels, Frankfurt, Luxembourg, Strasbourg and The Hague). 	<ul style="list-style-type: none"> ☞ Consistency between project delivery plans and proposed transnational partner meetings. ☞ Necessity of proposed meetings (units). ☞ Location of proposed meetings (countries where the participating institutions are based or cities housing an EU institution).

<p>Intellectual Outputs</p> <p>Only for Development of Innovation projects (i.e. not available to School Exchange Partnerships or projects targeting the Exchange of Good Practices).</p>	<ul style="list-style-type: none"> ☞ Intellectual nature of products is clear (i.e. large-scale outputs that require significant intellectual input (for example, new or revised curricula, pedagogical materials, IT tools, open educational resources, analyses, studies, peer-learning materials) and not those costs already covered under management and implementation (for example, management plan, dissemination plan, brochures, leaflets) ☞ Funding is provided for working days (fixed daily rates exist for different countries and categories of staff). ☞ Management and Administrative staff categories are not normally funded (funding for these categories can be exceptionally requested but should be fully justified). 	<ul style="list-style-type: none"> ☞ Intellectual outputs should be tangible outputs that are intellectual in nature and substantial in quality and quantity (for example, new or revised curricula, pedagogical materials, IT tools, open educational resources, analyses, studies, peer-learning materials) when compared to those elements already covered under project management and implementation. ☞ Forecast resources (days, categories) are realistic, and not excessive, in terms of being able to deliver the planned output/s. ☞ Any involvement from “management” and “administrative” staff is adequately justified.
<p>Multiplier Events</p> <p>Only for Development of Innovation projects (i.e. not available to School Exchange Partnerships or projects targeting the Exchange of Good Practices).</p>	<ul style="list-style-type: none"> ☞ Multiplier Events must relate to one or more intellectual outputs therefore, where no intellectual outputs are planned, multiplier events cannot be financed. ☞ Multiplier events should target the marketing and promotion of intellectual outputs to wider national and international audiences (i.e. beneficiary organisations cannot be funded to participate in these events). ☞ Multiplier events can include national and transnational conferences-seminars-events. ☞ Multiplier events should normally take place in the countries of the beneficiaries (in either Programme or Partner countries) or in cities housing an EU institution; exceptionally, and where clearly justified, multiplier events can take place “associated partner” countries. ☞ Maximum funding of €30,000 under this heading. 	<ul style="list-style-type: none"> ☞ Planned events relate specifically to one or more of the intellectual outputs listed in the application and have a focus on marketing and promotion (piloting or training events are not to be considered under this heading). ☞ Costs are included only for wider participants: costs for project beneficiaries cannot be funded. ☞ Costs are included for events in Programme or Partner countries where beneficiaries are located or in cities housing an EU institution; exceptionally, and where clearly justified, events can also be held in the countries of the associated partners. ☞ Convincing levels of participation, from the host country and/or abroad, that will allow event goals to be fully achieved.

Transnational Learning,
Teaching and Training
Activities

Available to all types of
Strategic Partnerships.

☞ Transnational learning, teaching and training activities vary across the different fields and can include the mobility of pupils, student, learners and other young people (blended mobility, intensive study programmes, long and short- and long-term pupil mobility) and staff mobility.

☞ Transnational learning, teaching and training activities must be embedded within planned project activities and must contribute to the achievement of broader project goals, bringing clear added-value to the project.

☞ Plans for learning recognition should be clear in all cases.

☞ Transnational learning, teaching and training activities for pupils/students/learners can be organised in Programme Countries only.

☞ Transnational learning, teaching and training activities for staff extend in some cases to Partner country involvement (i.e. short-term joint staff training events can take place in Programme and Partner countries; staff from Partner countries, in the field of HE, can participate in LTTs in Programme countries).

☞ Transnational learning, teaching and training activities must take place in the countries in which beneficiaries are located, or in cities housing an EU institution.

☞ Inclusion of costs only for eligible learning, teaching and training activities for the field/s being targeted by the project: eligible activities are further detailed on page 293-297 of the Erasmus+ Programme Guide (Version 2, 2018).

☞ Appropriateness of plans for the delivery of transnational learning, teaching and training activities.

☞ Suitability of plans for learning recognition.

☞ Inclusion of costs only for transnational learning, teaching and training activities taking place in Programme countries or, exceptionally, for staff mobility activities that extend to Partner country involvement.

☞ Inclusion of costs only for transnational learning, teaching and training activities taking place in countries where beneficiaries are located, or in cities housing an EU institution.

<p>Transnational Learning, Teaching and Training Activities (continued)</p> <p>Available to all types of Strategic Partnerships.</p>	<ul style="list-style-type: none"> ☞ Transnational learning, teaching and training activities must be transnational (i.e. involving more than one beneficiary country) with participants from the host country also able to be considered (travel costs are only available for those travelling >10km according to the online distance calculator. ☞ Additional funding is available for linguistic support for activities lasting 2-12 months. 	<ul style="list-style-type: none"> ☞ Inclusion of costs only for transnational learning, teaching and training activities which involve participants from beneficiary organisations in at least two different programme countries. ☞ Inclusion of costs for linguistic support only where activities are fully described and justified and only for activities lasting 2-12 months.
<p>Exceptional Costs</p> <p>Available to all types of Strategic Partnerships.</p>	<ul style="list-style-type: none"> ☞ Costs can be funded at up to 75% of their actual value and can relate to subcontracting and/or the provision of goods and services. ☞ Clear justification must be given for all exceptional costs, aligned with broader project narratives. ☞ Costs for financial guarantees, where requested by the National Agency, can be included under this heading. ☞ Costs for visas, smartphones and normal office equipment cannot be included. ☞ Maximum funding of €50,000 in this heading (ceiling excludes financial guarantees). ☞ Additional funding is available to cover expensive travel costs (only allowed where applicants can justify that standard funding rules - based on unit costs and travel distance bands - do not cover at least 70% of participant travel costs; funded up to 80% of actual costs). 	<ul style="list-style-type: none"> ☞ Costs are clearly justified and relate to clearly defined project activities. ☞ Costs do not appear excessive or unrealistic. ☞ Costs do not include any of the excluded expenditure items. ☞ Inclusion of costs for expensive travel costs is sufficiently described and justified.

<p>Special Needs</p> <p>Available to all types of Strategic Partnerships.</p>	<ul style="list-style-type: none">☞ Costs must relate to participants whose “physical, mental or health-related situation” is such that project participation would not be possible without extra financial support.☞ Actual costs (forecasts) should be submitted and will be assessed on a case-by-case basis, for which the individual situation should be described (in addition to with the required additional costs) in the application form.	<ul style="list-style-type: none">☞ The situation is well described including in terms of the “special needs” of one or more participants and the additional costs needed to enable their participation in the project.☞ Costs relate to clearly-defined project activities.
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