



# Intra-Africa Academic Mobility Scheme

## Contractual obligations & Financial management

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*Project Advisor*  
*EACEA A.3*

2020 Projects' Kick-Off Meeting  
2-4 February 2021

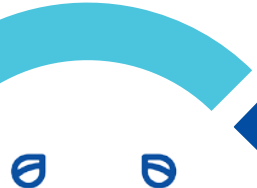


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# Session Content

Working with EACEA



Contractual obligations

Financial rules



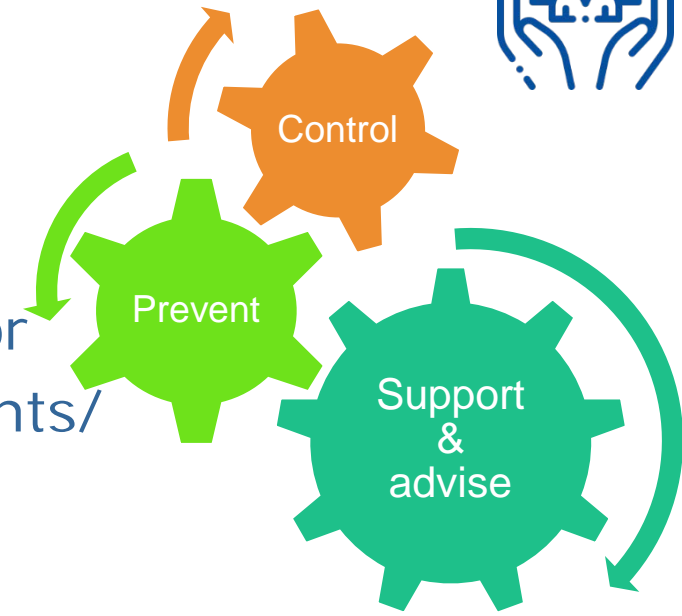
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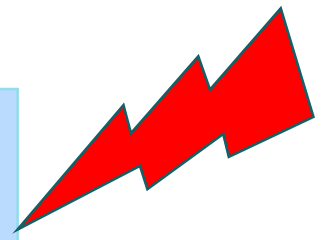
# Working with EACEA



- **Regular contacts** (e-mails/phone) with project coordinator
- **Contractual monitoring** (request for changes/ amendments/ payments)
- **Assessment** of project implementation and achievements
  - Assessment of reports / EACEA Mobility Tool / project's website...
  - Online meeting / monitoring visits
  - Financial audits



**Formal (/contractual) correspondence** - to be signed by the Legal Representative and addressed to the Head of Unit A.3 in EACEA



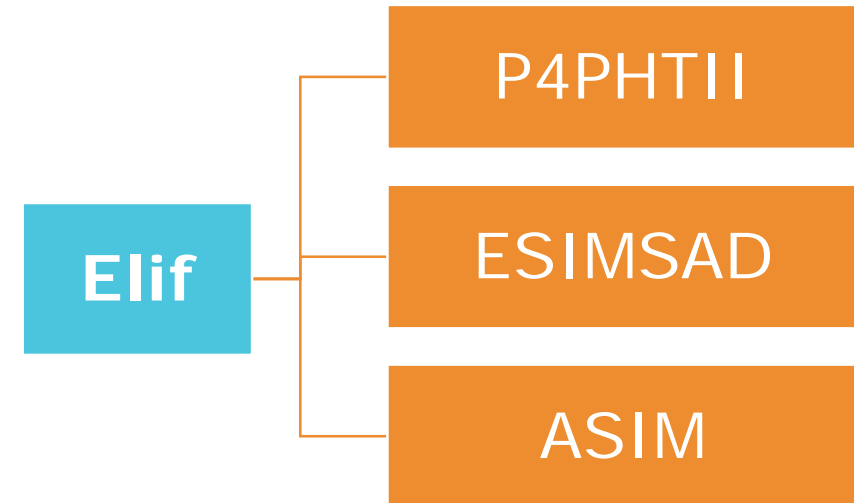
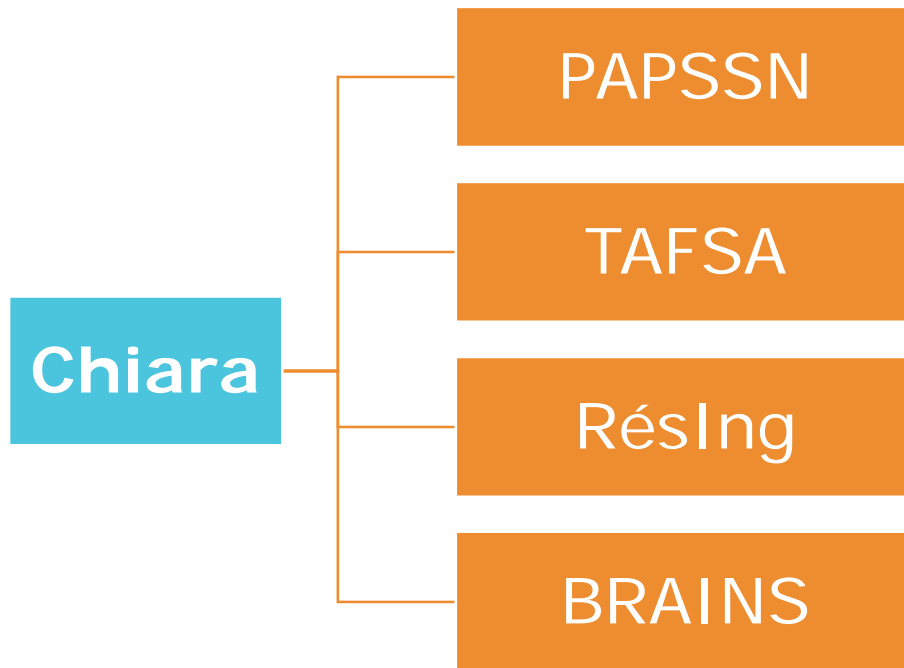
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# Working with EACEA



## Designated Project Officer at EACEA for each project

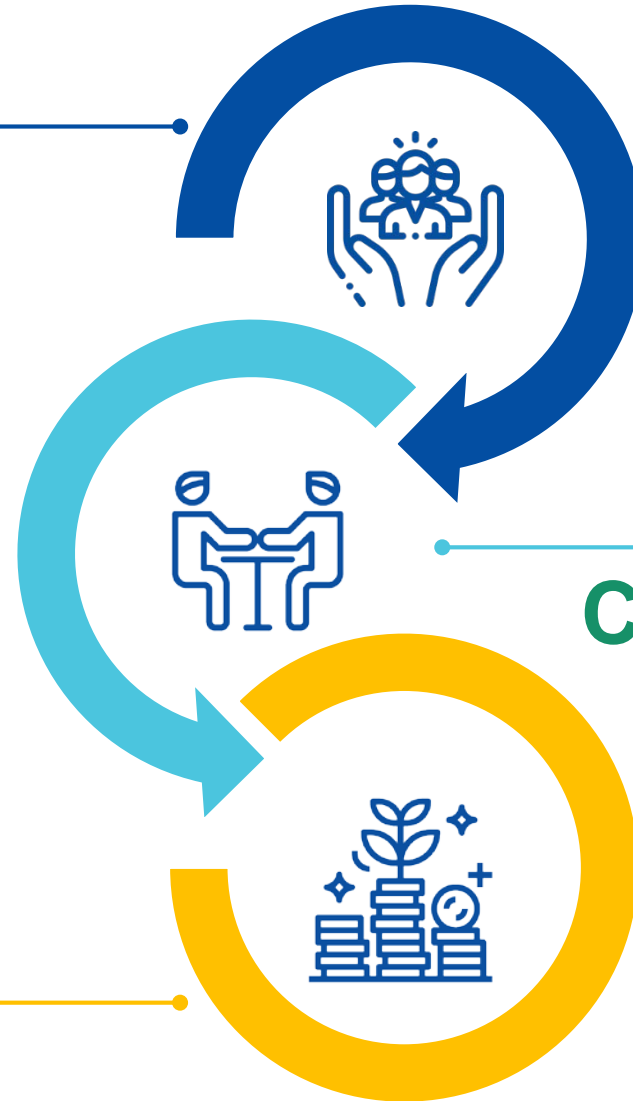


Functional mailbox: [eacea-intrafrica-intraacp@ec.europa.eu](mailto:eacea-intrafrica-intraacp@ec.europa.eu)



# Session Content

Working with EACEA



**Contractual obligations**

Financial rules



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# Legal framework



## Call for proposals EACEA/07/2020

### **Project's Grant Agreement**

#### **Special conditions**

**Description of the action (Annex I)**

**Gen. Conditions (Annex II)**

**Budget (Annex III)**

**Other Annexes**

Guidance documents for projects implementation available on EACEA Website in the "[Beneficiaries' space](#)"

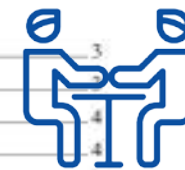


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# Call for proposals EACEA/07/2020



**Criteria & requirements**  
for the organisation and implementation  
of student and staff mobility

## Financial provisions

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# Call for proposals EACEA/07/2020



## Eligible individuals: **STUDENTS**



National of and resident in  
any of the African countries

+

### Target Group 1

Registered/admitted in or having obtained a HEI degree from one of the African HEIs included in the partnership

### Target Group 2

Registered/admitted in or having obtained a HEI degree from a HEI established in Africa BUT not included in the partnership



### Min/max mobility duration

Master 6-24 months

Doctorate 6-48 months



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Students having already benefitted from a previous scholarship under the Intra-ACP or Intra-Africa Academic Mobility Scheme are **not eligible**



# Call for proposals EACEA/07/2020



**Eligible individuals: STAFF**



National of and resident in  
any of the African countries

+

(Target Group 1)

Work for a **HEI included in the partnership** as  
coordinator or partner



**Min/max mobility duration**

Staff

1-6 months



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# Call for proposals EACEA/07/2020



Must be your  
project's  
objectives!

## Mobility recommendations



### Distribution per type

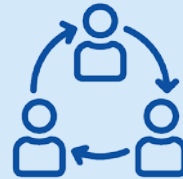
Master	50-70%
Doctorate	15-30%
Staff	10-30%



Mobility of TG1:  
**min 40%** of the total  
mobility



**No more than 20%**  
of the total number of  
mobility flows from the  
same African country



**Balanced distribution**  
of mobility flows within  
the partnership HEIs



**Gender balance**



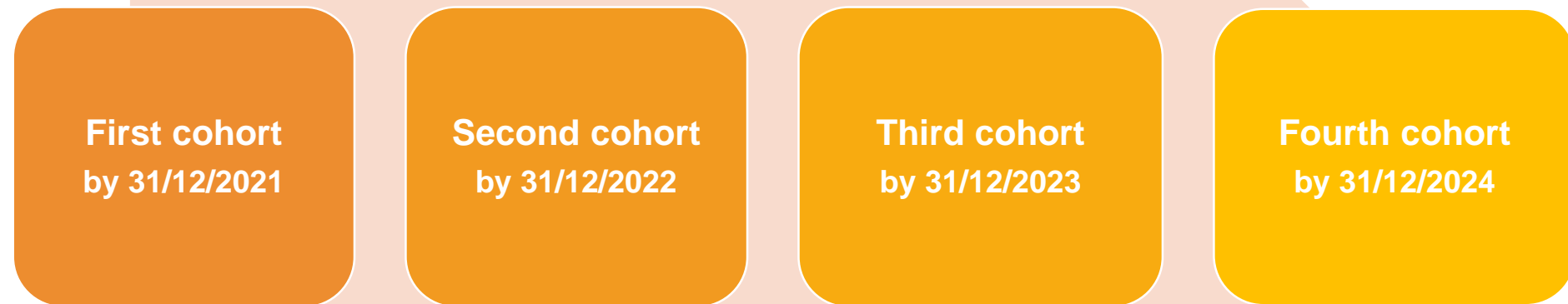
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# Call for proposals EACEA/07/2020



## Student mobility (indicative timeline)



**All mobility flows must finish by the end of the project eligibility period**



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# Grant Agreement



## **Grant Agreement for an action with multiple beneficiaries**

- Grant Agreement signed by the coordinating HEI on behalf of the partnership

### ❖ **Special Conditions**

- ❖ Annex I: Description of the action
- ❖ Annex II: General Conditions ('the General Conditions')
- ❖ Annex III: Estimated budget of the action
- ❖ Annex IV: List of beneficiaries and **mandates**
- ❖ Annex V: Models technical report (progress and final)
- ❖ Annex VI: Model financial statement
- ❖ Annex VII: Model terms of reference for the certificate on
- ❖ Annex VIII: Model terms of reference for the certificate or applicable
- ❖ Annex IX: Model terms of reference for the operational ve
- ❖ Annex X : Minimum insurance requirements

**Shared obligations & responsibility of the partnership!**



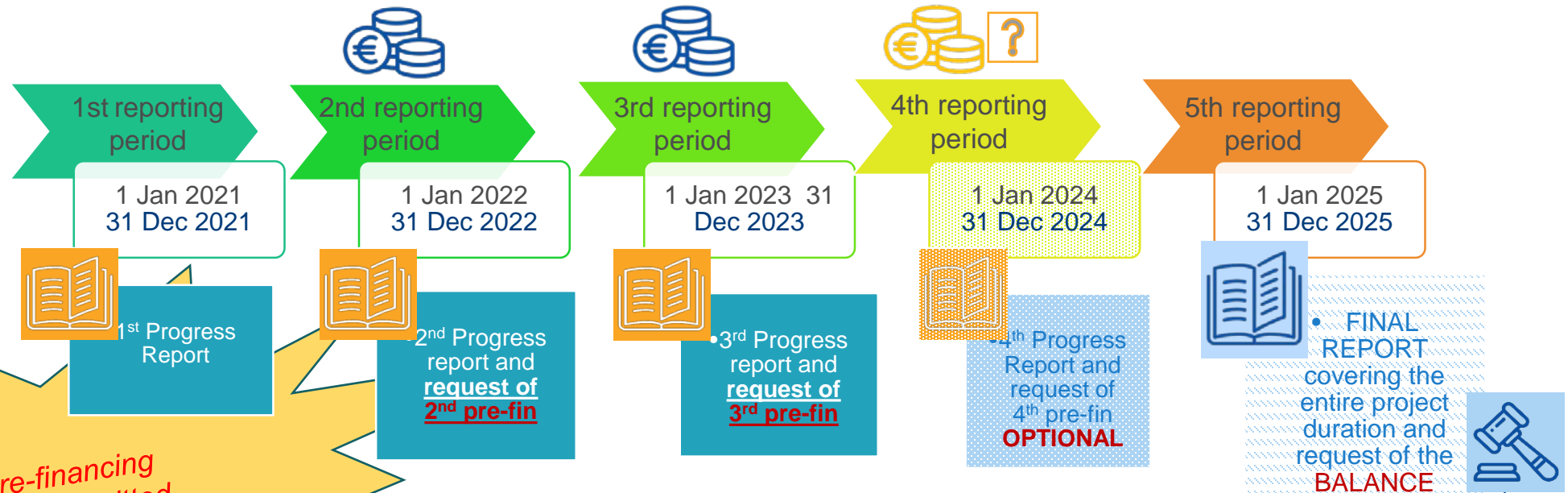
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# Grant Agreement – Special conditions



## Article I.4 – Reporting – Requests for payment and supporting documents



Reports and pre-financing requests must be submitted **within 60 calendar days** following the end of the reporting period



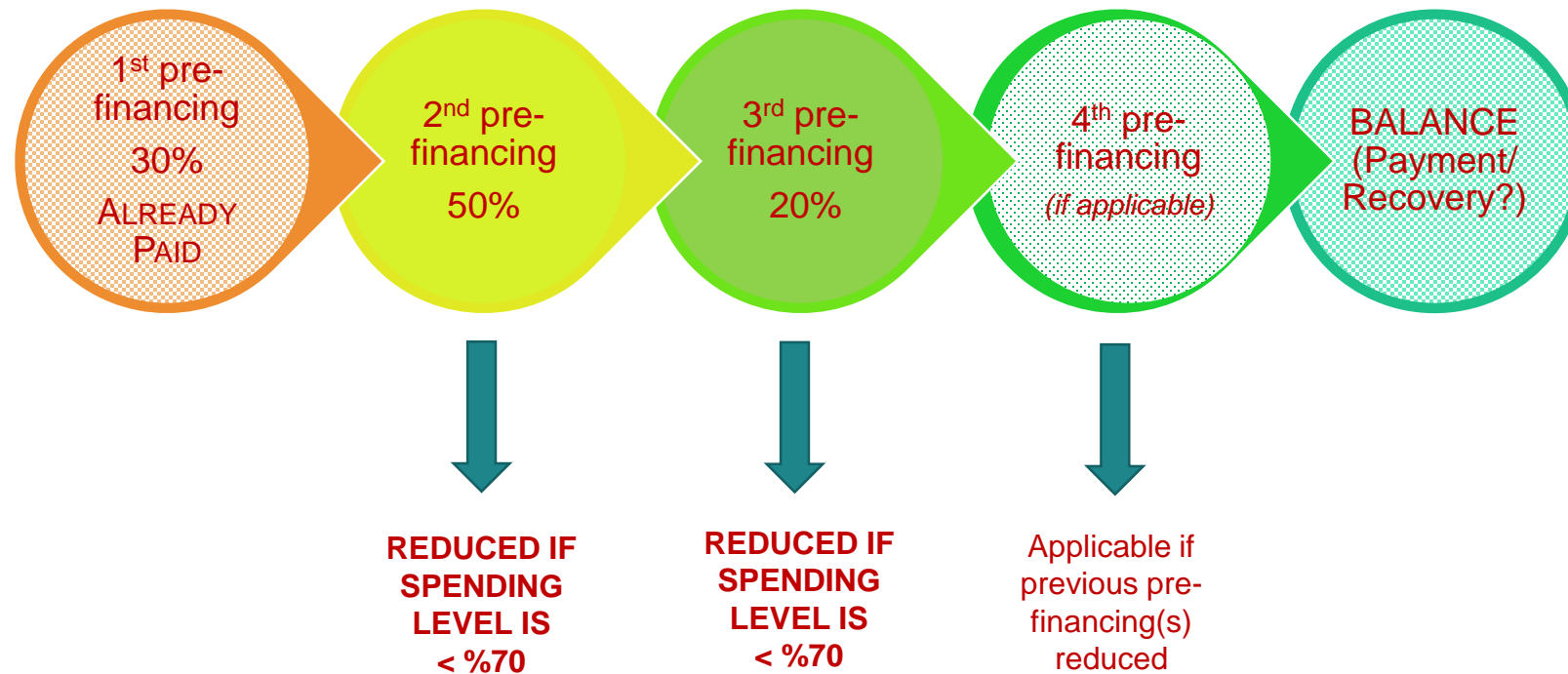
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# Grant Agreement – Special conditions



## Article I.5 — Payments and Payment arrangements



- ✓ I.5.1 Payments to be made
- ✓ I.5.2 Pre-financing payments
- ✓ I.5.4 Payment of the balance
- ✓ I.5.5 Notification of amounts due
- ✓ I.5.6 Interest on late payment
- ✓ I.5.7 Currency for payments
- ✓ I.5.8 Date of payment
- ✓ I.5.9 Costs of payment transfers
- ✓ I.5.10 Payments to the coordinator





# Grant Agreement – Special conditions



## ARTICLE I.6 — BANK ACCOUNT FOR PAYMENTS



All payments must be made to the coordinator's bank account, denominated in **Euro, US Dollar** or a **local currency pegged to Euro or US Dollar**



To **avoid** (account in EURO) or **limit** (account in USD or local currency pegged to EURO/USD)

**the risk of exchange losses**



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# Grant Agreement – Special conditions



## I.4.6 Currency for requests for payment and financial statements and conversion into Euro

Beneficiaries 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**

Partners receiving funds for allowances, to open a bank account in EURO if their currency is not pegged to EURO/USD

Limit the number of transfers to other currencies as much as possible

*Some recommendations...*

Centralised management and payments



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# Grant Agreement – Special conditions



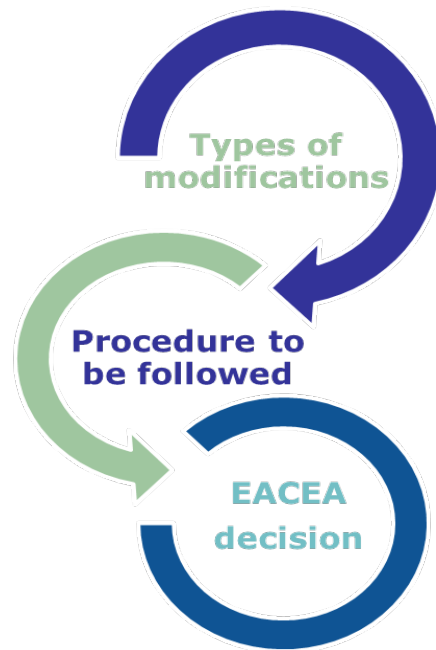
## Article I.14 – Grant reduction in the case of non-compliance with an obligation under the grant agreement and for non-, poor, partial, or late implementation



# Grant Agreement – Amendments



## General Conditions **ARTICLE II.13** Practical information – Beneficiaries' space



Limit the number of requests

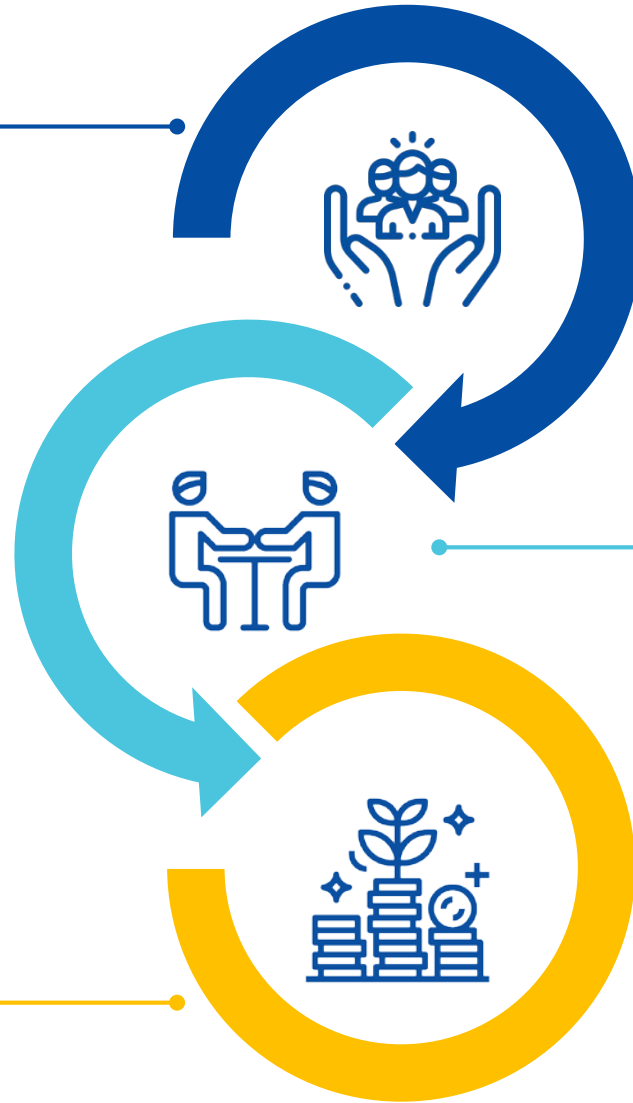
Approval is not automatic

	<b>A.1</b> EXCHANGE OF LETTERS (Amendment)	<b>A.2</b> AMENDMENTS VIA THE PARTICIPANT PORTAL (Amendment)	<b>A.3</b> AMENDMENTS BY EMAIL (Amendment)	<b>A.4</b> NOTIFICATION
<b>CHANGES</b>	<ol style="list-style-type: none"> <li>1) Change in the partnership composition</li> <li>2) Change of the coordinating institution</li> <li>3) Extension of the eligibility period</li> <li>4) Substantial changes to the description of the action (incl. the mobility plan)</li> <li>5) Change of the legal representative of the coordinator</li> <li>6) Change of bank account information</li> <li>7) Change of deadline for submission of reports &gt; 30 days (without extension of eligibility period)</li> </ol>	<ol style="list-style-type: none"> <li>1) Change in the legal status/type of a beneficiary</li> <li>2) Change of legal name of a beneficiary</li> <li>3) Change of legal address</li> <li>4) Change of language/website</li> </ol>	<ol style="list-style-type: none"> <li>1) Change of the address of a beneficiary (<i>not of the coordinator</i>)</li> <li>2) Change of the legal representative of a beneficiary (<i>not of the coordinator</i>)</li> <li>3) Change of the contact person (<i>i.e. person dealing with the project on a daily basis</i>)</li> </ol>	<ol style="list-style-type: none"> <li>1) Change of an associated partner within the partnership</li> <li>2) Change of deadline for submission of reports (&lt; 30 days)</li> <li>3) Changes of contact data of the legal representative / contact person</li> </ol>



# Session Content

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Contractual obligations

Financial rules



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# Session Content



## Forms of the grant: Lump Sums and Unit Costs

Purpose, management and supporting documents

## How to calculate the EU contribution to the scholarships

Rules on calculation of mobility duration



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# Forms of the grant

## Lump sum and unit costs

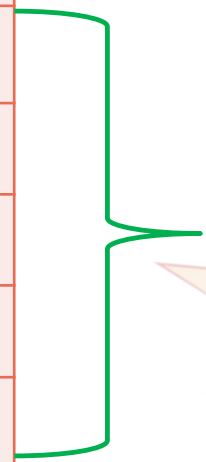


Lump-sum

Unit costs

	Budget in € (Grant Agreement)
<b>1. Organisation of the mobility</b>	<b>140.000</b>
<b>2. Implementation of the mobility</b>	<b>1.260.000</b>
2.1 Subsistence allowances	750.000
2.2 Travel and visa costs	100.000
2.3 Participation costs	250.000
2.4 Research costs	90.000
2.5 Insurance costs	70.000
<b>TOTAL</b>	<b>1.400.000</b>

Transfer of budget  
**NOT** allowed btw  
Lump sum amount  
and  
Unit costs amount



Adjustments *ONLY* possible  
within the sub-headings of  
2. Implementation of the  
mobility



# 1. Lump sum (for organisation of the mobility)



## PURPOSE:

To cover management costs (e.g. organisation/participation in partnership meetings, participation in EACEA meetings, promotional and dissemination activities, hiring support staff, etc.)



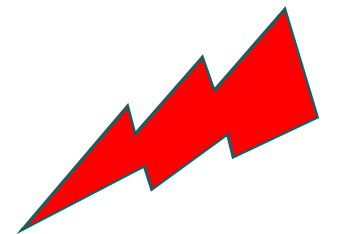
## CALCULATION:

20.000 € x number of partners (including the EU Tech. Partner)



## MANAGEMENT:

Internal decision ON USE AND DISTRIBUTION depending on the needs/tasks of each partner. To be agreed and fixed in the MoU.



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## 2. Unit costs (for implementation of the mobility)



Type of mobility	Subsistence allowance (per month)	Settling-in allowance (single payment)	Allowances for female scholarship holders (per academic year only for mobility equal or longer than 2 academic years)	Participation costs (per academic year only for mobility equal or longer than 10 months)	Research costs (per academic year only for mobility equal or longer than 10 months)	Insurance costs (per month)	Travel and visa costs
Master	600 €	600 €	600 €	3.500 €	600 €	75 €	According to travel bands
Doctorates	900 €	900 €	900 €	4.000 €	2.000 €	75 €	
Staff	1.200 €	-	-	-	-	75 €	
	<b>Must be paid in full to the scholarship holder</b>			<b>To be managed by the partnership</b>			



# Distance bands and corresponding unit costs for travel and visa costs

Distance (km)	Unit cost (EUR)
< 500	275
500 – 1.000	550
> 1.000 – 1.500	825
> 1.500 – 2.500	1.100
> 2.500 – 5.000	1.650
> 5.000 – 10.000	2.200

For calculating the distance please refer to:

[http://ec.europa.eu/programmes/erasmusplus/tools/distance\\_en.htm](http://ec.europa.eu/programmes/erasmusplus/tools/distance_en.htm)

# 2. Unit Costs - implementation of the mobility



## 2.1 SUBSISTENCE ALLOWANCES



**PURPOSE:** to cover the costs of living abroad, including installation costs for students and incentives for female students for longer study period abroad

<b>A. Subsistence allowance</b>	<ul style="list-style-type: none"><li>• <u>monthly</u> instalments <u>for total duration</u> of the mobility</li></ul>
<b>B. Settling-in allowance (for students only)</b>	<ul style="list-style-type: none"><li>• 1 additional instalment provided <b>upon arrival</b></li></ul>
<b>C. Allowance for female scholarship holders</b>	<ul style="list-style-type: none"><li>• 1 additional instalment <b>per academic year</b> of mobility</li><li>• <b>only for</b> mobility equal or longer than 2 academic years (i.e. minimum 20 months + fulfilment of academic obligations)</li></ul>

**MANAGEMENT:** Paid in full to the scholarship holders



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# 2. Unit Costs - implementation of the mobility



## 2.2 TRAVEL AND VISA COSTS



**PURPOSE:** to cover costs of travel tickets and ALL costs related to visa issuing

- One unit costs granted for each student/staff in mobility (inbound+ outbound travel) - eligibility linked to the actual purchase of travel ticket (triggering event)
- For mobility equal or longer than 2 academic years => 2 unit costs granted (if 2 travels have taken place)
- Unit cost amount based on the distance "as the crow flies" (departure location - depending on target group -> host institution)
- If mobility cancelled, unit cost for travel and visa costs can be claimed (providing reasons for cancellation and proof that ticket was not refundable)

**MANAGEMENT:** the total amount is managed by the partnership



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# 2. Unit Costs - implementation of the mobility



## 2.3 PARTICIPATION COSTS

 **PURPOSE:** to cover costs such as tuition/registration fees, library costs, residence permit, language courses costs etc.



Mobility of <b>more</b> than 10 months	Mobility of <b>less</b> than 10 months
<ul style="list-style-type: none"><li>• <b>One unit cost</b> per academic year* per mobility <i>*1 academic year = minimum 10 months + all the academic obligations corresponding to 1 academic year fulfilled</i></li></ul>	<ul style="list-style-type: none"><li>• <b>No participation costs can be claimed</b></li><li>• Students continue paying tuition fees at their home institution</li></ul>



**MANAGEMENT:** total amount managed by the partnership / share based on actual participation costs of incoming students (*rules to be established in the MoU*)



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## 2. Unit Costs - implementation of the mobility



### 2.4 RESEARCH COSTS



**PURPOSE:** to cover the costs linked to research activities such as laboratory consumable expenses, field research costs, registration for online research platforms etc.



Mobility of <b>more</b> than 10 months	Mobility of <b>less</b> than 10 months
<ul style="list-style-type: none"><li>One unit cost per academic year* per mobility</li></ul>	<ul style="list-style-type: none"><li>No research costs can be claimed</li></ul>



**MANAGEMENT:** total amount managed by the partnership / share based on on actual research needs of incoming students (*rules to be established in the MoU*)



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## 2. Unit Costs - implementation of the mobility



### 2.5 INSURANCE COSTS



**PURPOSE:** to grant insurance coverage (in line with Annex X of the GA)



- **One unit cost per month**/scholarship holder.
- Insurance cover must take effect by the time the scholarship holder start her/his journey to participate in the mobility and must be valid until one month after the end of the mobility.



**MANAGEMENT:** total amount managed by the partnership



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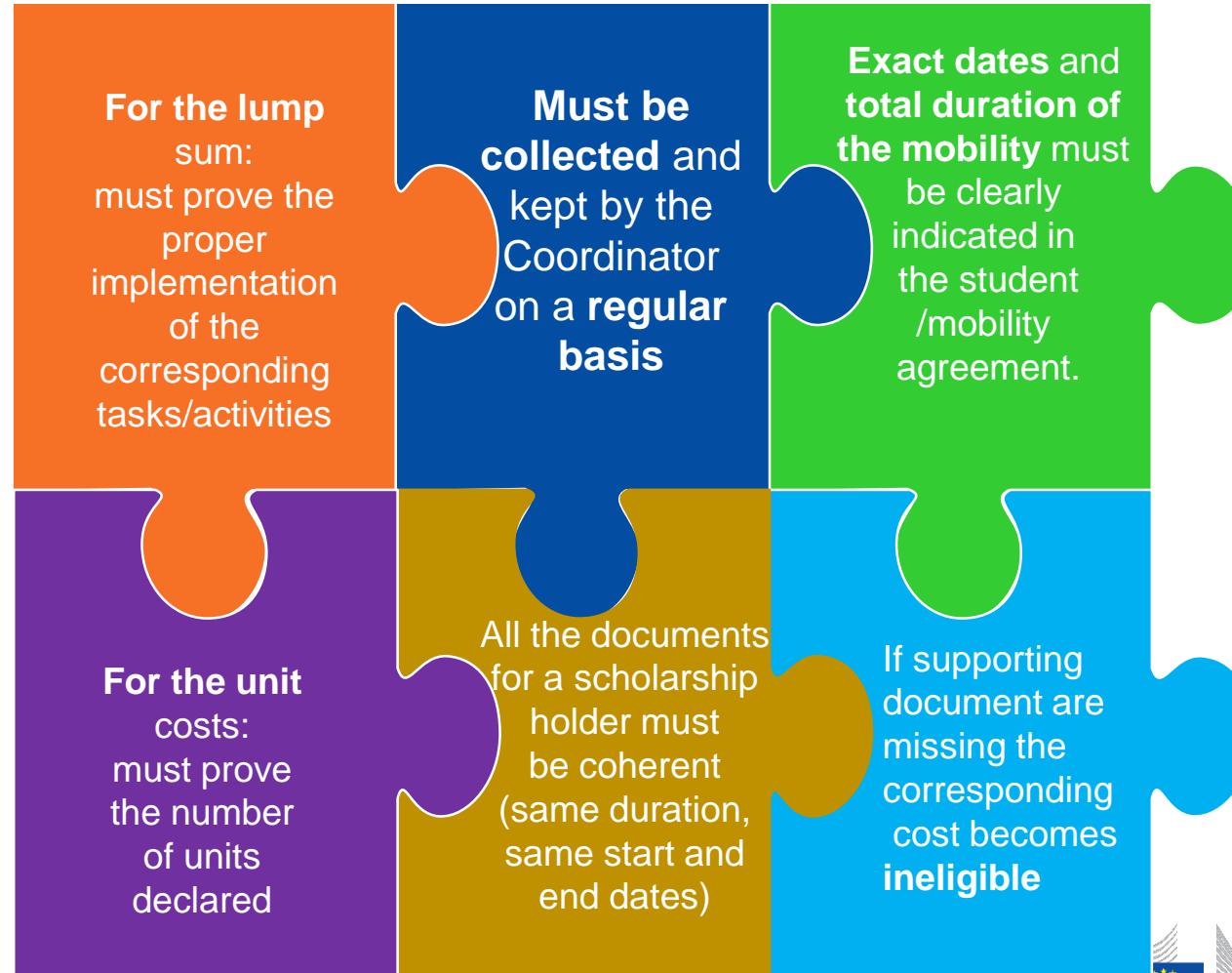
# Supporting documents



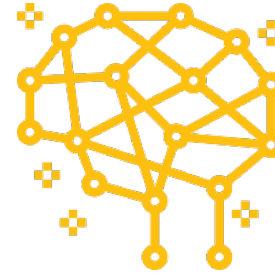
	<b>Indicative list of supporting documents</b>
<b>Lump sum for the organisation</b>	<b>Proofs of proper implementation of the corresponding activities (e.g. minutes of meetings, dissemination and promotion material, etc.)</b>
<b>Subsistence, settling-in and additional allowances</b>	<b>Student id/passport Student/mobility agreement Monthly bank transfer</b>
<b>Participation costs</b>	<b>Student/mobility agreement</b>
<b>Research costs</b>	<b>Student/mobility agreement Proofs of research activities</b>
<b>Insurance costs</b>	<b>Proof of insurance cover for whole mobility period (e.g. insurance policy contract and nominal insurance certificate)</b>
<b>Travel and visa costs</b>	<b>Return travel ticket, boarding passes, invoice</b>



# Supporting documents



# How to calculate the EU contribution to the scholarship ?



# Calculation of the EU contribution per mobility



**Duration  
of mobility  
(in months)**

**Subsistence  
allowances**

600 € x month for Master  
900 € x month for Doctorate  
1.200 € x month for Staff

**Participation  
Costs**

< 10 months = 0 €  
> or = 10 months = 3.500 € Master x academic year  
4.000 € Doctorate x academic year

**Research costs**

< 10 months = 0 €  
> or = 10 months = 600 € Master x academic year  
2.000 € Doctorate x academic year

**Travel and visa  
Costs\***

Based on target group + distance in Km + mobility  
duration -> one or two Unit Costs

**Insurance  
costs**

75 € x number of months for each scholarship holder

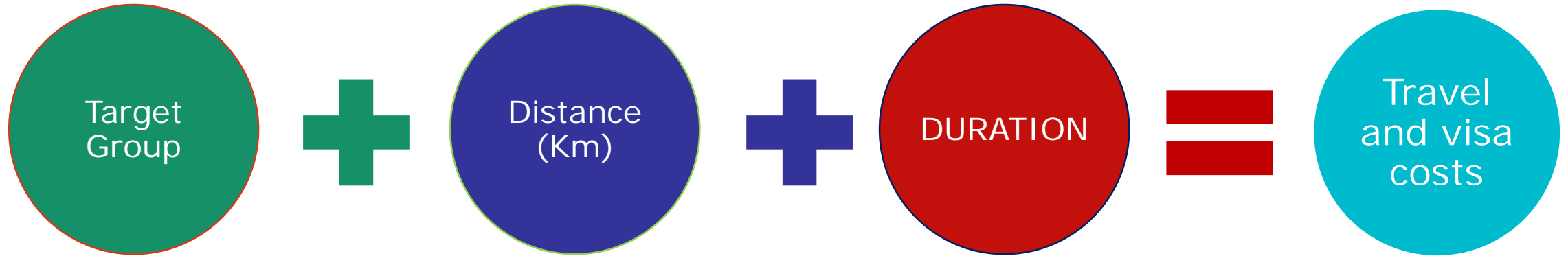


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# \*Calculation of Unit Costs for travel and visa



Distance between host HEI and:  
TG1 → location of the home HEI  
TG2 → location of origin of the student

To apply the correct unit cost, calculate Km using the tool indicated in the Call

For mobility = or > than 2 academic years two unit costs are allowed



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# How to calculate mobility duration in months



**Duration in months = *duration in days* / 30**

Duration in days = number of calendar days between start and end dates

in Excel use the formula: ***=ROUND((End date-Start date)/30;2)***

The result with 2 decimals must be rounded to the nearest integer:

- if the **decimals are < 49** => the number of months is **rounded down**;
- if the **decimals are > or = to 50**, the number of months is **rounded up**.

## Example

start date 20/01/2017,  
end date 30/07/2017 => 191 days  
**191:30 = 6,37**  
the nearest integer to 6,37 is 6 =>  
6 months to be declared

# Final grant amount



## (1) Lump sum contribution amount

(≤ amount specified in the GA and corresponding activities deemed to be implemented properly)

(2) Unit costs multiplied by the number of units “occurred” and deemed eligible by EACEA



**Cannot exceed the maximum amount of the grant**

Grant Awarded and paid in pre-financings:

**Final Grant calculated (1 + 2):**

Amount to be reimbursed:

*(even if real costs incurred = 1.350.000 EUR)*



**NO actual costs to be reported**

1.400.000 EUR

1.300.000 EUR

100.000 EUR



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# Thank you



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