

Centres of Vocational Excellence 2025

The funding mechanism Lump Sum Type II grants



Lump Sum Type II – What does it mean in practice?

- ☐ The proposal must provide a **detailed estimation of costs** in an **Excel table** available with the application form.
- The grant calculated per Work Package and beneficiary becomes the budgetary annex 2 of the grant agreement.
- □ Pre-financing payments (at start and mid stage) are not linked to the delivery/completion of the WPs (e.g. to release the next pre-financing in full, 70% of previous prefinancing has to be consumed).
- ☐ A final Payment will be made on the basis of the delivery and completion of the work packages and deliverables.





Lump sum grant – Budget allocation

Annex 2 of model grant agreement (example)

	WP1	WP2	WP3	WP4	WP5	WP6	WP7	WP8	Total
Beneficiary A	250.000			50.000	300.000	250.000		300.000	1.150.000
Beneficiary B		250.000	350.000	50.000			100.000	150.000	900.000
Beneficiary C	100.000	100.000		50.000		280.000			530.000
Beneficiary D		120.000		50.000			100.000	150.000	420.000
Total	350.000	470.000	350.000	200.000	300.000	530.000	200.000	600.000	3.000.000

Lump sum = Maximum grant amount



Lump Sum Type II – What are work packages?

A work package (WP):

- ✓ Is a major sub-division of the project in terms of a group of activities.
- √ Has objectives, activities and deliverables
- ✓ Can have multiple deliverables (a single activity/task is not a WP). A deliverable is a concrete result that can be uploaded in our platform.

A proposal can have as many work packages as deemed appropriate but keep in mind that:

- ✓ Projects should normally have a minimum of 3 work packages and can be managed with less than 8 as an average.
- ✓ Work packages should be designed so that they are completed at different times.
- ✓ Horizontal work packages (e.g.: management, dissemination, etc.) may run over the lifetime of the project
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Lump sum approach – cost estimations

Cost estimations:

- Are subject to same eligibility rules as costs in standard, budget-based (actual costs) grants (see <u>annotated grant agreement</u>)
- Must be in line with beneficiaries' normal practices
- Must be reasonable / not excessive
- Must be in line with and necessary for the activities proposed in the project proposal

Points of attention:

- Indirect costs are fixed at 7% unless the beneficiary has an operating grant
- All costs are to be reported regardless of co-financing. The EU grant is 80% of the costs of each WP.

Payment of the EU grant

Duration	Beginning of project	Mid-term of project	End of project (Final report)
4 years	40%	40%*	Max 20%
	First pre- financing	Second pre- financing	Balance payment



Lump sum – The detailed budget table (Excel)

BE 001			BE 001	BE 001	
			Vet Organisat		
	Vet Organisation AAA	UNITS	COST PER UNIT	BENEFICIARY TOTAL COSTS	BE+AE TOTAL COS
	Total WORK PACKAGES:			46.652	46.6
Δ	. DIRECT PERSONNEL COSTS			20.000	20.0
۴	A1. Employees (or equivalent) person months			20.000	20.0
L	Manager	50	400	20.000	20.0
ı	Teacher/researcher	- 30	400	20.000	20.0
ı	Technical				
ı	Administrative				
l	Other				
ı	A.2 Natural persons under direct contract				
ı	A.3 Seconded persons				
l	A.4 SME Owners without salary				
ı	A.5 Volunteers				
В	. Subcontracting costs				
_	Purchase costs			23.600	23.6
г	C.1 Travel and subsistence per travel or day			3.600	3.6
L	Travel	6	200	1.200	1.2
L	Accommodation	6	200	1.200	1.2
L	Subsistence	12	100	1.200	1.2
l	C.2 Equipment (please refer to the Depreciation Cost sheet)			-	
L	C.3 Other goods, works and services			20.000	20.0
ı	Consumables			-	
ı	Services for Meetings, Seminars			-	
L	Services for communication/promotion/dissemination			-	
L	Website			-	
l	Artistic Fees			-	
	Other (please specify details under worksheet "Comments")	1	20.000	20.000	20.0
D	. Other cost categories			-	
Г	D.1 Financial support to third parties			-	
T	OTAL DIRECT COSTS INCLUDING SUBCONTRACTING (A+B+C+D)			43.600	43.0
Γ				-	
E	Indirect costs 7% (rounded to zero decimals)			3.052	3.0
ī	OTAL COSTS (A+B+C+D+E) -			46 652	46.0

- Staff costs must correspond to real salaries
- ✓ Travel, hotel, per diem. See C(2021) 35
- ✓ Volunteers. See <u>C(2019)</u>
 2646
- ✓ SME owners. See <u>C(2020)</u>
- ✓ Financial support to third parties (prizes, grants) : NOT ELIGIBLE

Include compulsory travel costs!

Costs for annual meeting:

The proposal must include costs for at least **one annual meeting** (1 representative from each full partner) organised by or at the initiative of the European Commission/EACEA for the **exchange of good practices and mutual learning** between Centres of Vocational Excellence



Common issues **and solutions**



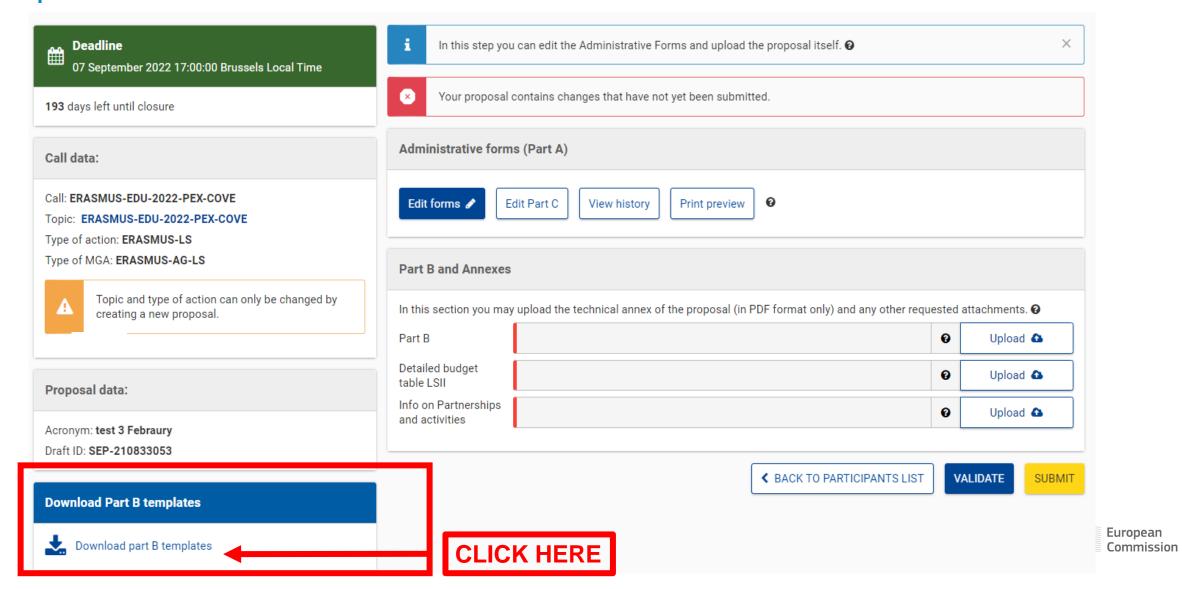


- ✓ Confusion between total estimated costs and EU grant. For example, If EU grant requested is 4 000 000 EUR then the total estimated costs are 5 000 000 EUR (grant is 80% of total estimated costs).
- ✓ Staff categories among different organisations. All partners must have identical commonly agreed names for each staff category
- √The budget in part A must contain the EU grant amounts and not total costs. Pay attention when completing this section in part A

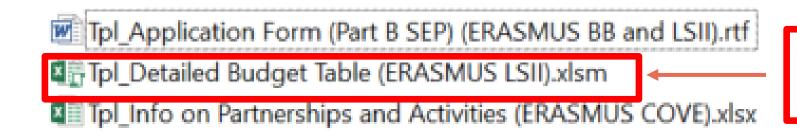


How to fill in the detailed budget table

1. Where to find the budget table (1)



1. Where to find the budget table (2)



This is the budget Excel file to be completed based on estimated costs



2. Presentation of the Excel table (1)

Instructions

1	This workbook for Lump Sum calculation must be uploaded in the Submission system as a mandatory document in annex to						
	the application.						
	Please note that if you do not upload the fully completed Excel workbook as an annex, the application cannot be submitted						
	(the system will not allow you to submit).						
2	According to the Lump sum scheme, the lump sum for a Work Package (WP) will normally be paid only when the entire						
	Work Package has been completed. Please take this into consideration while structuring your proposal. Work Packages						
	should be designed in a way that enables the evaluator to clearly identify whether the action has been completed.						
	should be designed in a way that chables the evaluator to clearly identity whether the action has been completed.						
_	We accommend using Funct 2010 on more accomb						
3	We recommend using Excel 2010 or more recent.						
4	The only currency used in this worksheet is EURO.						
5	The first thing you need to do is to set the relevant Maximum Grant Amount (in row 32 of this sneet), and the maximum						
	% of co-financing (in row 33, both in column E) applicable for the call.						
	This data can be found on the Portal under Topic Conditions and in the Call document.						
6	You then have to fill in only the following sheets: 'Beneficiaries List' – 'Work Package list' – 'BE XXX' (one sheet per						
	Participating Organisation) – 'Depreciation costs' (if you sudget includes the purchase of equipment) and the last column						
	of the 'Proposal Budget' sheet with the Request a EU Grant Amount						
7	You first need to start filling in the sheet 'Beneficiaries list' where you are asked to enter all participants in the project						
	including any Affiliated Edities.						
	To add beneficiaries, please double-click on 'Add a Beneficiary'; to add an affiliated entity, please, double-click on 'Add an						
	Affiliate Entity'.						
Instr	ructions Beneficiaries List Work Packages List BE 001 Estim costs of the project Proposal Budget BE-WP Overview BE-WP Person						

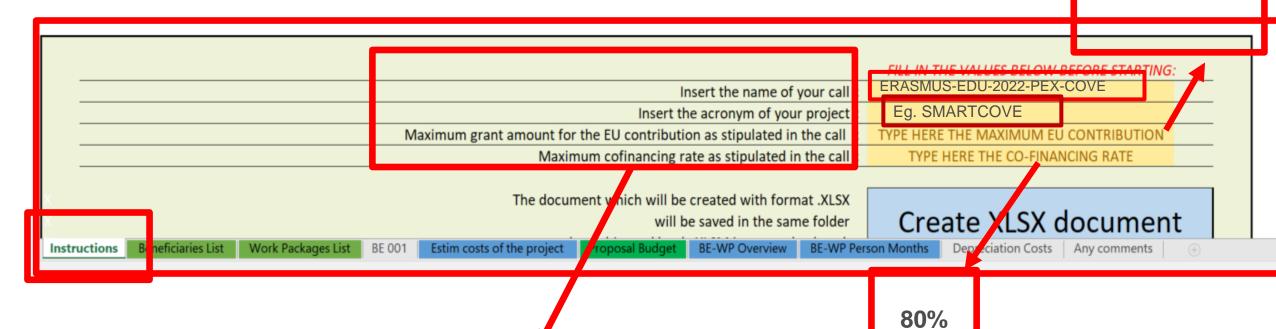
Read carefully the tab instructions where you will find the information needed to fill in this Excel file



2. Presentation of the Excel table (2)

Max EU contribution = EU grant

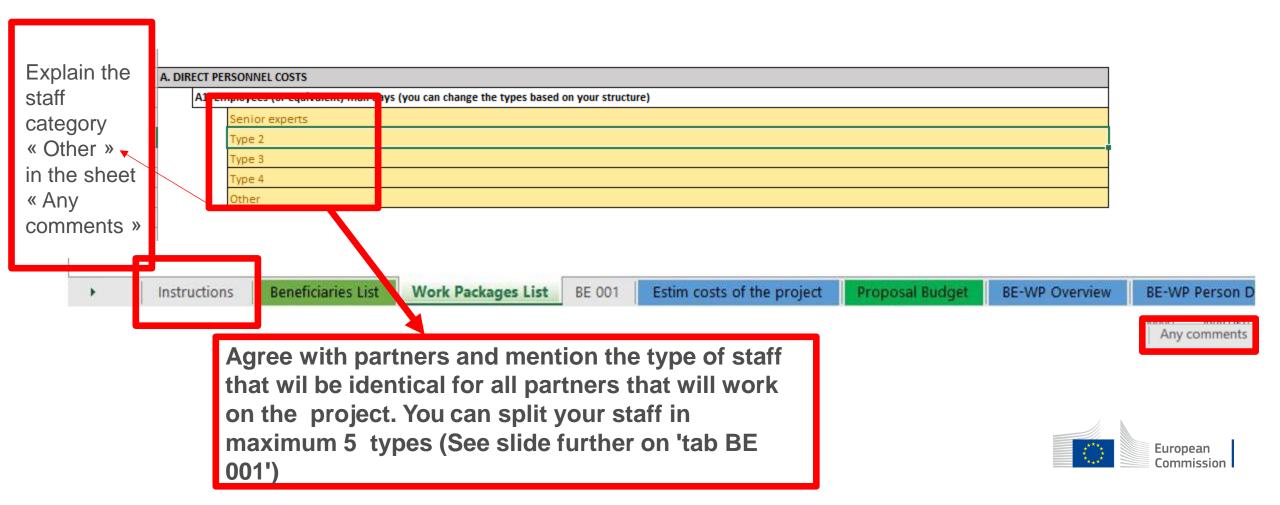
4 000 000 EUR



You will first have to fill in that information in the tab « Instructions » based on the information mentioned in the Erasmus+ Programme Guide



2. Presentation of the Excel table (3)



3. Beneficiaries list (1)

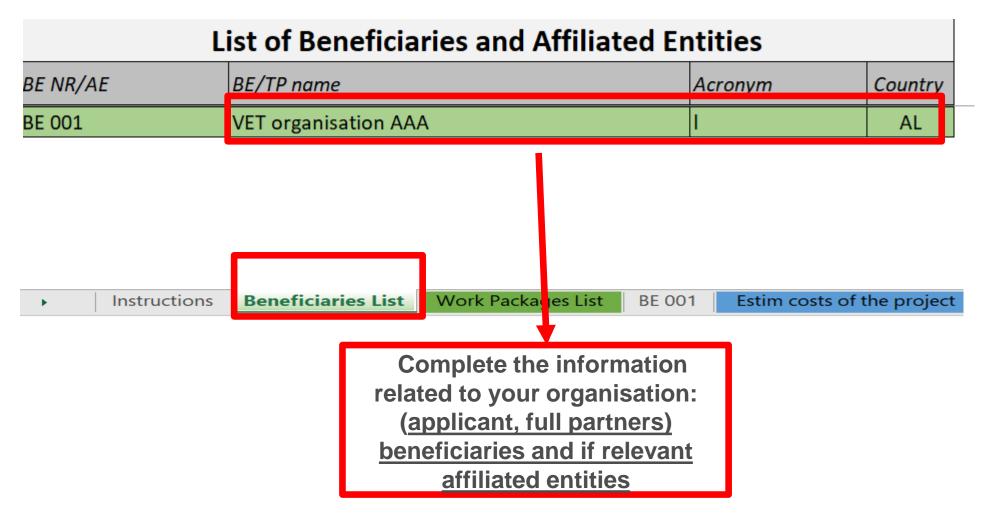
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4	The only currency used in this worksheet is EURO.
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7	You first need to start filling in the sheet 'Beneficiaries list' where you are asked to enter all participants in the project including any Affiliated Entities. To add beneficiaries, please double-click on 'Add a Beneficiary'; to add an affiliated entity, please, double-tex on 'Add an Affiliated Entity'. NOTE: the costs of Associated Partners cannot appear in any part of this budget.
8	Then you can fill in the sheet 'Work Packages list', where you are asked to enter all We Work Packages. To add a work package, please double-click on 'Add a Work Package'.
9	Once you have completed the 'Beneficiaries List' and 'Work Package ast' sheets, or each time you add or remove a beneficiary or a work-package, you must double-click on one or the "Apply changes" buttons to generate the related sheets in the Excellent workbook. At this stage your spreadsheet is ready to be edited Beneficiary by Beneficiary (BE XXX) for all the workpackages structions.

These tabs have to be filled for your budget table to be complete, before uploading it into the **Submission** system

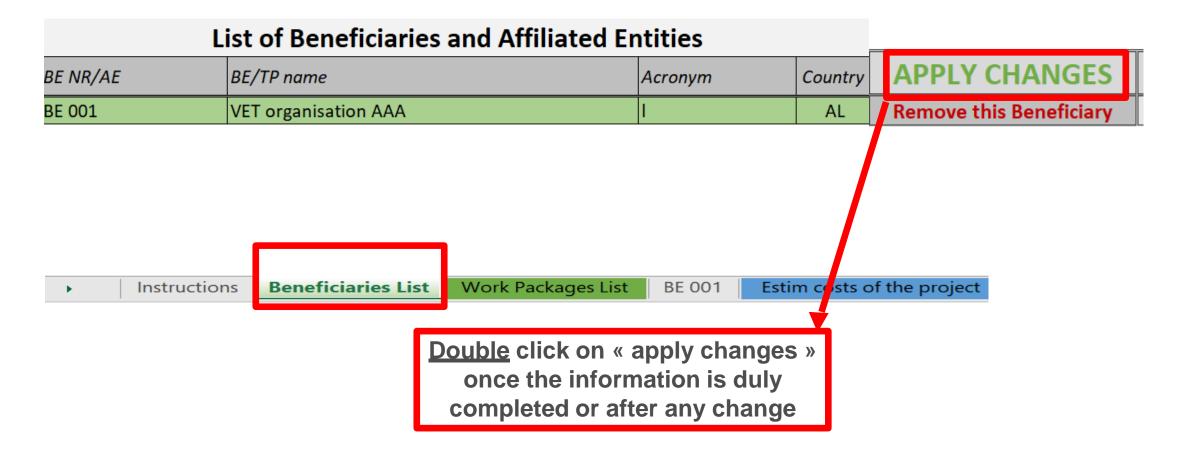


3. Beneficiaries list (2)



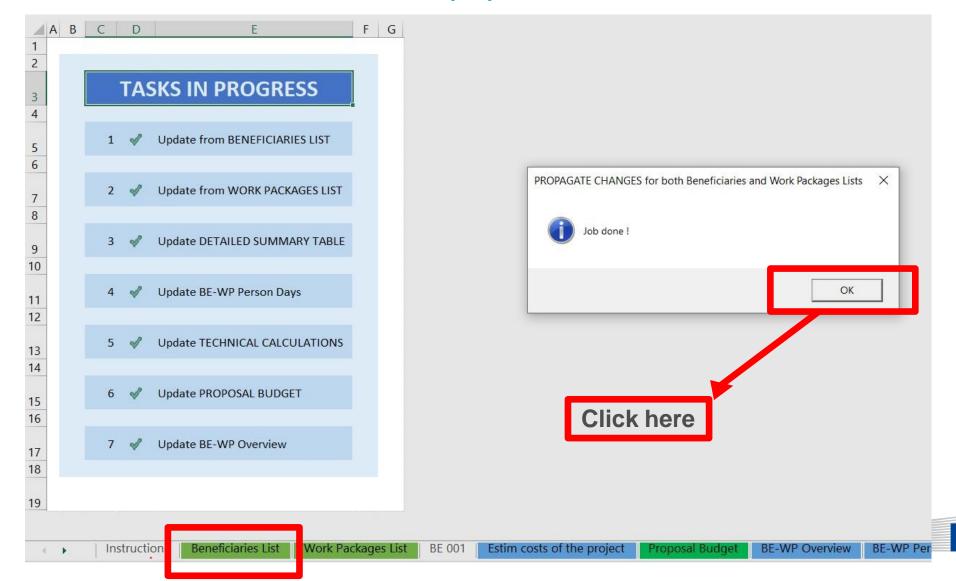


3. Beneficiaries list (3)



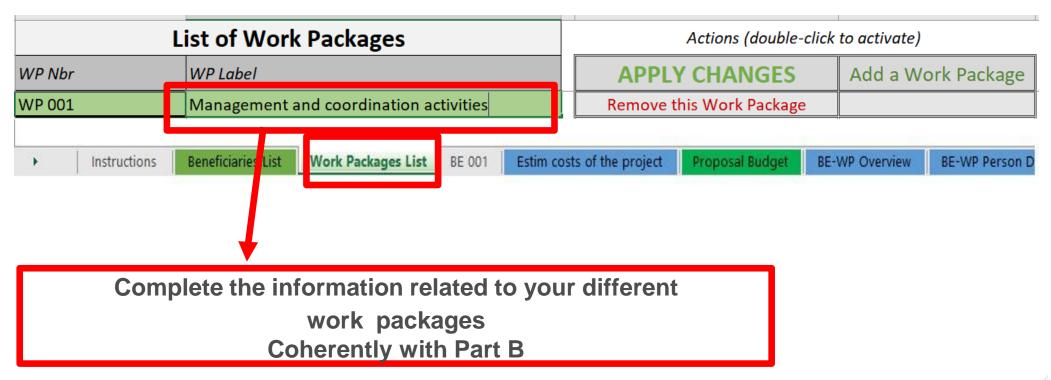


3. Beneficiaries list (4)



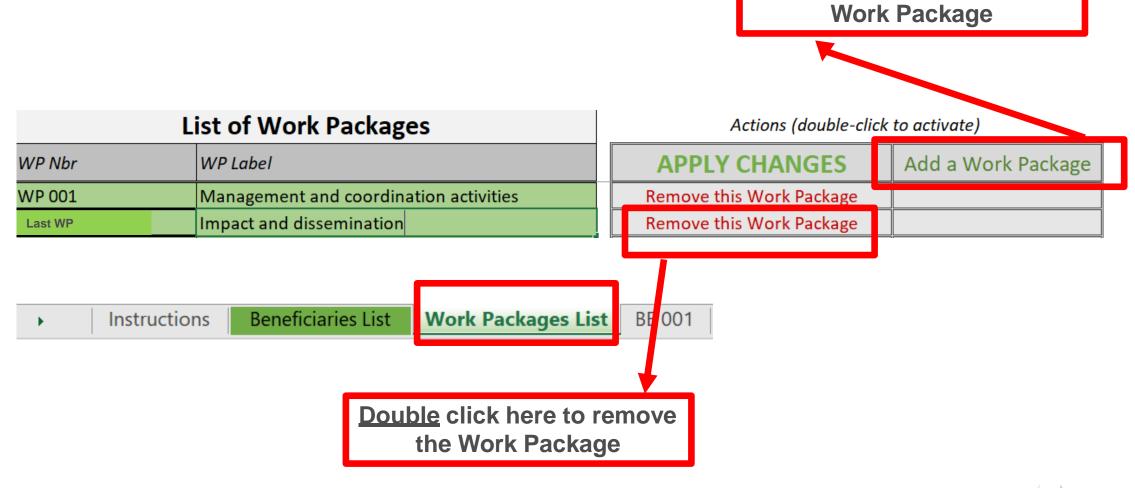
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4. Work Packages list (1)





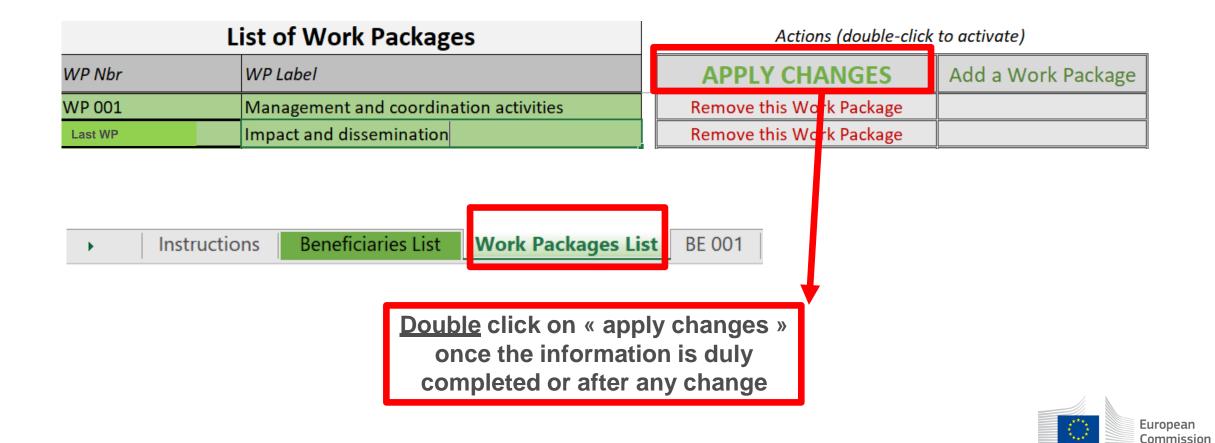
4. Work Packages list 2)



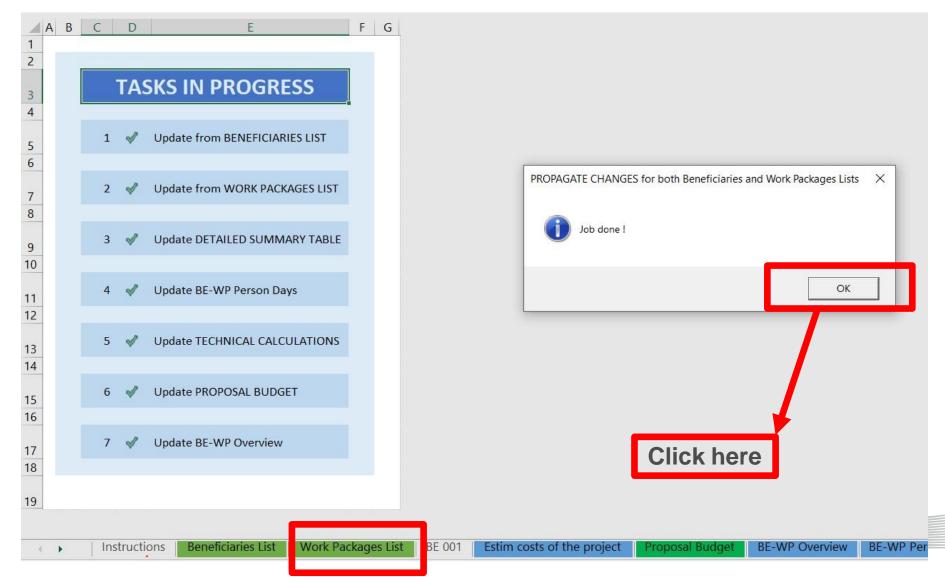


Double click here to add a

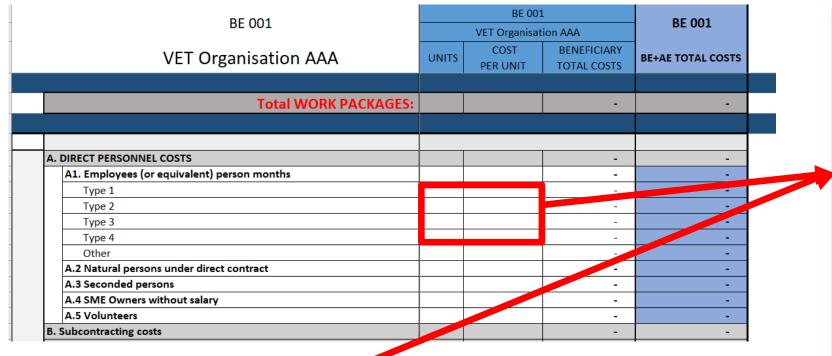
4. Work Packages list (3)



4. Work Packages list (4)



European Commission 5. Insert the estimated actual costs (1)



A. DIRECT PERSONNEL COSTS

See initial slides 'Instructions' to update the type of staff.

You have to encode your costs using the following unit: 1 unit is 1 personmonth

You first have to calculate average amounts if you have different costs per staff member

A1. Employees (or equival	(or equivalent) man days / La can change the types based on your structure)				
Senior experts					
Type 2					
Type 3					
Туре 4					
Other					

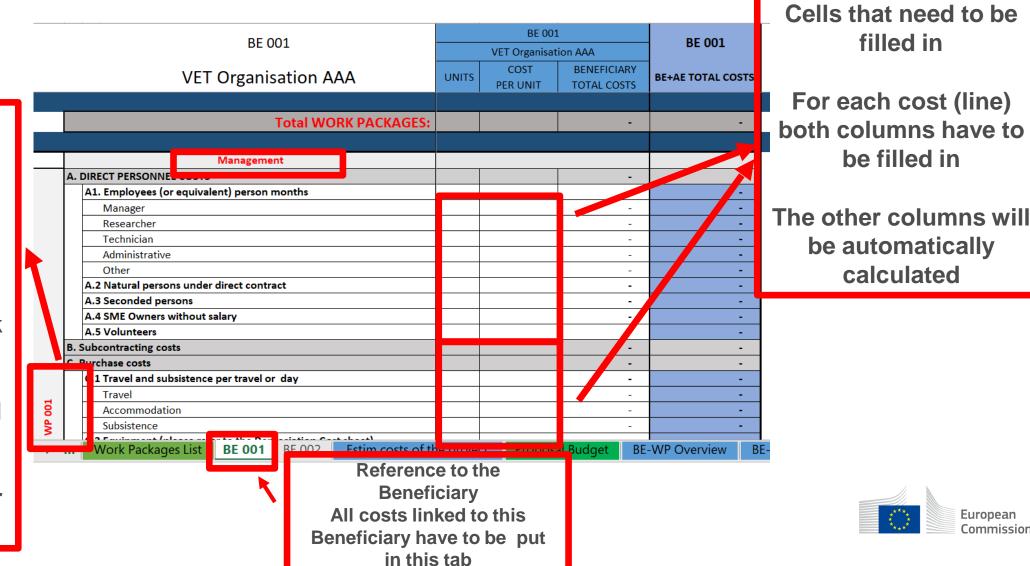


5. Insert the estimated actual costs (2)

Reference to the Work **Package**

Just go down in the Excel sheet to see the other Work **Packages**

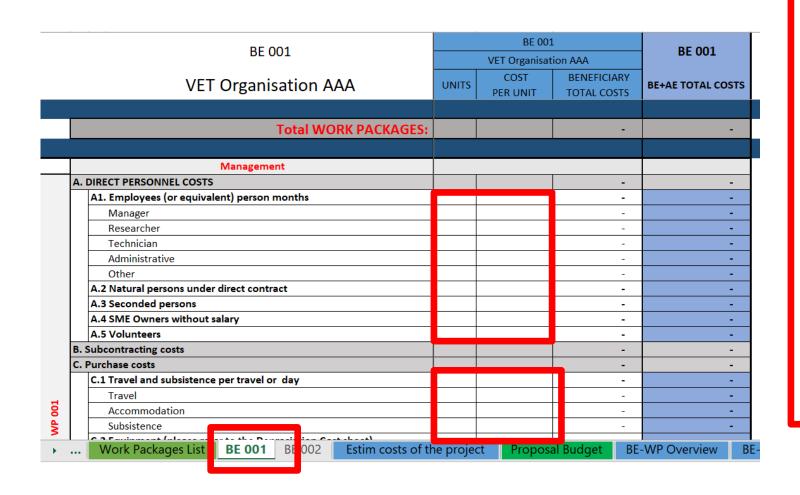
You have to fill in the estimated actual cost per **Work Package**



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Commission

5. Insert the estimated actual costs (3)



If you have a cost (line) with different costs per unit, you have first to calculate an average amount in order to fill in the cells. Decimals are allowed.

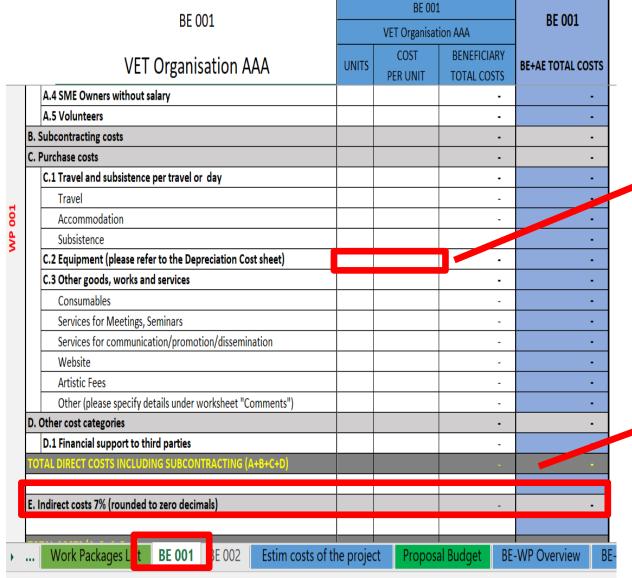
You have to estimate the eligible costs of your proposal using the same methodology as if these costs should be declared under an actual cost-based grant agreement

For additional information, please refer to the Annotated Grant Agreement

Then repeat this procedure to the other Work Packages below



5. Insert the estimated actual costs (4)



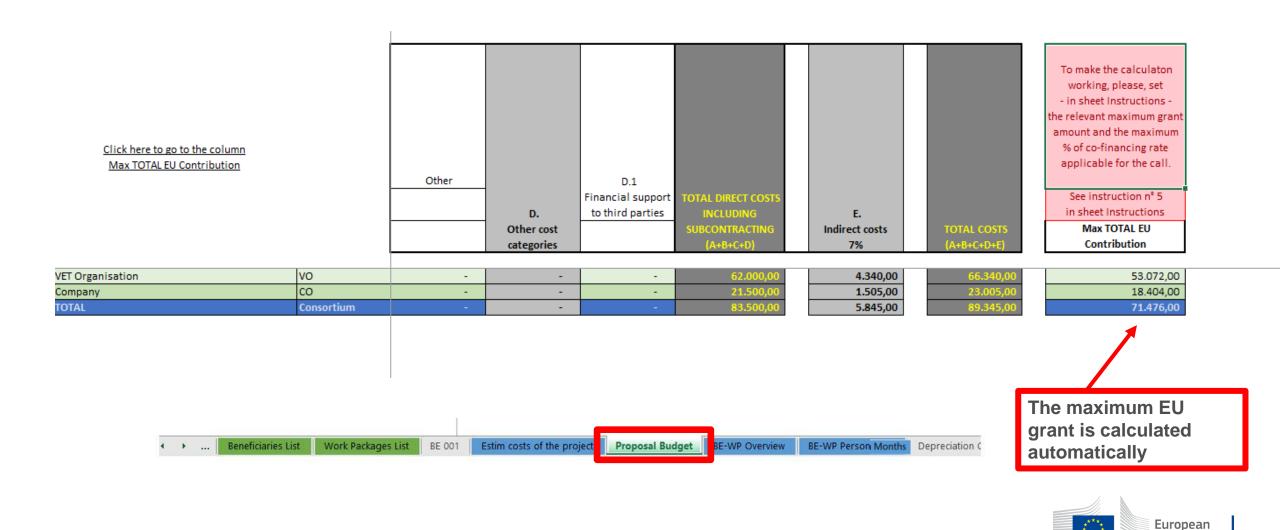
Most of the projects cannot declare equipment costs as they are already included in the indirect costs

However, in some exceptional circumstances, the purchase, rent or lease of equipment that are specific and necessary for the project could be accepted

The indirect costs are automatically calculated and are intended to cover all costs linked to the general administration of the project (PCs, portables, supplies, paper, electricity, etc.)

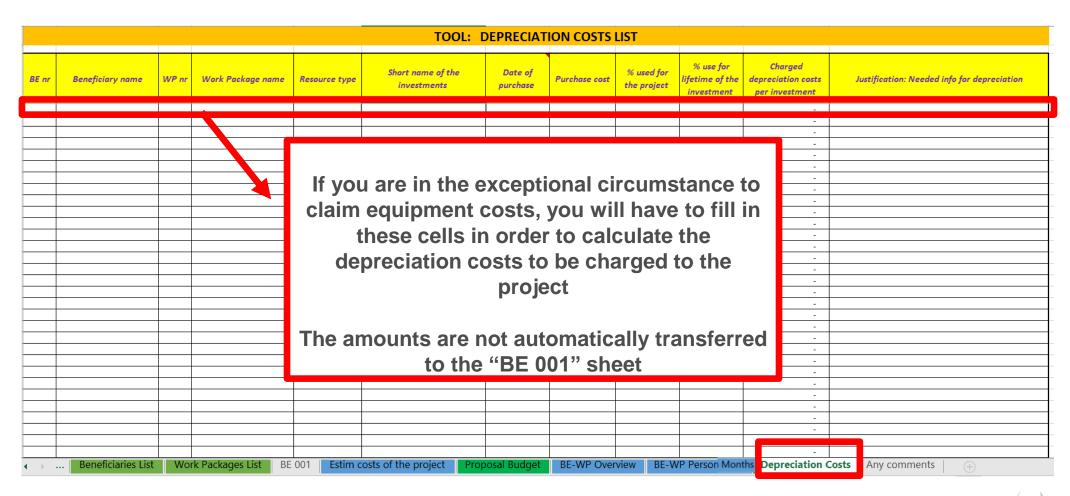


6. Proposal Budget (2)



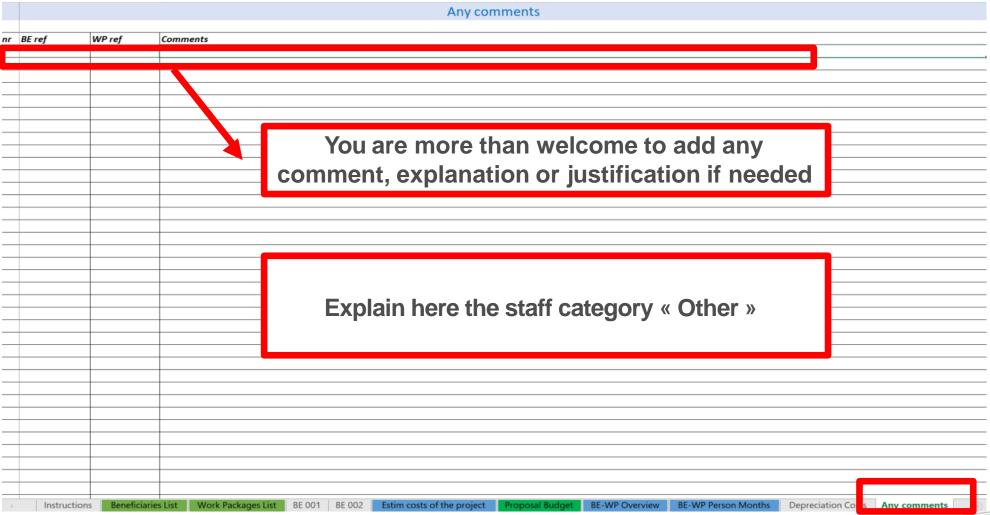
Commission

7. Complementary information (1)





7. Complementary information (2)





8. Upload the file in the application (1)

Estim costs of the project

Manager

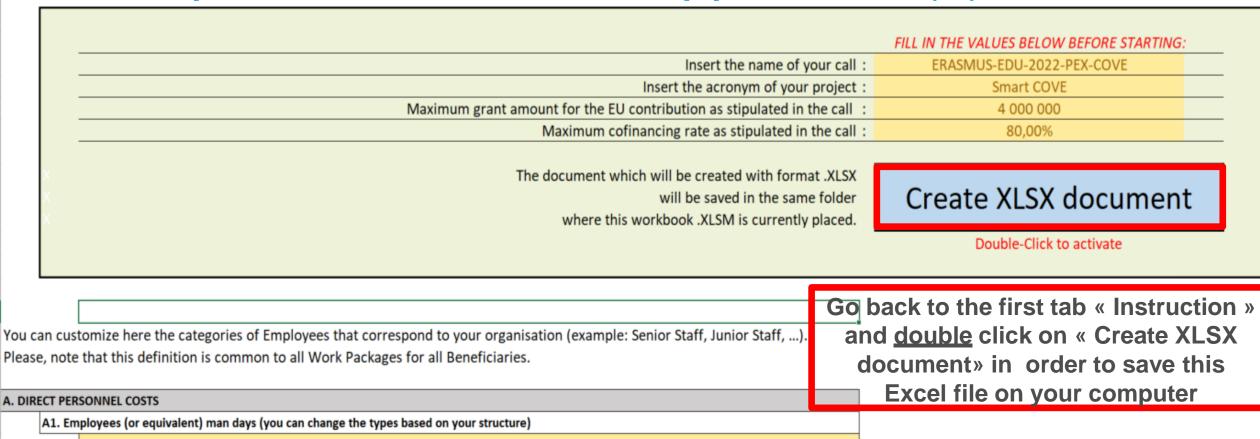
Technician

Instructions

Researcher/teacher

eneficiaries List

Work Packages List BE 001 BE 002



Proposal Budget

BE-WP Overview

BE-WP Person Months

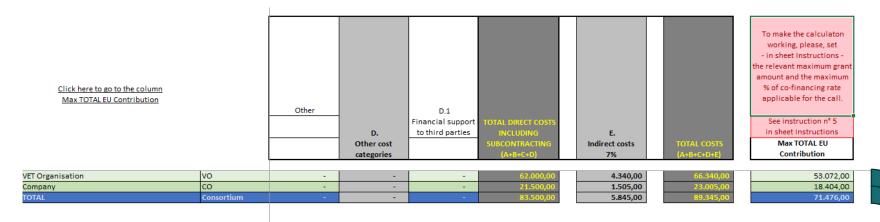
Depreciation Costs | Any comments

8. Upload the file in the application (2)

Part B and Annexes		
In this section you may upload the technical anno	ex of the proposal (in PDF format only) and any other requested	attachments. 🛭
Part B	€	Upload 🕰
Detailed budget table LSII	Ø	Upload 🕰
Info on Partnerships and activities	0	Upload 📤
	The budget table can be uploaded as Excel file	



9. Update the amount in PARTA



3 - Budget

The total amount has to be updated in « PART A » of the application (Edit forms / 3. Budget)

No	Name of Beneficiary	Country	Requested grant amount
1	VET Organisation	BG	53 072.00
2	Company	BG	18 404.00
	Total		71 476.00

European Commission

Thank you



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