

**Erasmus+ Youth Accreditation**  
**European Solidarity Corps Quality Label**  
**[DRAFT] RULES FOR BUDGET ALLOCATION**  
**Call 2021**

This document defines detailed rules for budget allocation to Erasmus+ accredited organisations and Quality Label lead organisations, in line with the frameworks established in the Erasmus+ and European Solidarity Corps Programme Guides. The process presented here is applicable for both programmes, with due consideration to key differences relating to the nature of actions, duration of projects and number of rounds.

At budget allocation stage there is no quality assessment. All eligible grant requests must receive funding. The awarded grant amount will depend on a number of elements:

- the total budget available for allocation
- the estimated budget required to implement the requested activities
- the minimum and maximum grant
- the following allocation criteria: qualitative performance, policy priorities and thematic areas addressed by the activities applied for and, optionally for Erasmus+, geographical balance<sup>1</sup>.

As specified in the Programme Guides, detailed rules on basic and maximum grant, scoring of the allocation criteria and the allocation method must be published by the National Agency ahead of the call deadline. This will be done by using the templates annexed to this document.

## **1. AVAILABLE BUDGET**

The NAs will publish the total budget available for allocation<sup>2</sup>, as approved by EAC in the NA Work Programme. For the European Solidarity Corps, the NA may choose to have more than one round, so the amount will be split per each round.

The available budget will be apportioned between the applicable allocation criteria in the following way<sup>3</sup>:

Minimum grants	At least [Amount in EUR]
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<sup>1</sup> Additional allocation criteria will be added in future calls. For 2021 data regarding financial and qualitative performance is not available.

<sup>2</sup> The final allocated budget may be lower than the specified amount if all applicants have been awarded the maximum amount according to the rules set out in this document. If additional funding becomes available, the National Agency may increase the available budget.

<sup>3</sup> Exceptionally, the specified amounts may be lowered if the budget required for inclusion support and exceptional costs is higher than originally foreseen; if all applicants have already been allocated the maximum amounts according to the rules set out in this document; or if a minor correction is required due to rounding rules.

Qualitative performance and policy priorities and thematic areas	At least [Amount in EUR]
Geographical balance (E+ only)	At least [Amount in EUR]

The total of the specified amounts must correspond to at least 75% of the total budget available, excluding the amount reserved for inclusion support and exceptional costs. The rest of the budget will be allocated by the NAs after the application deadline. This provides flexibility for the NAs to see which allocation criterion would need extra budget, after applications are received and there is a clearer picture of the demand. This extra funding can also be put in the inclusion reserve mentioned below.

At least 10% of the total budget must be allocated for minimum grant, at least 40% to qualitative performance and policy priorities and, if applicable, between 10-20% for geographical balance.

In addition, a specific amount will be reserved for budget categories based on reimbursement of real costs.

Exceptional costs	[Amount in EUR]
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In case of need, the National Agency may further increase the reserved amount. If part of the reserved funds is left unused, the National Agency may distribute them in a second round.

## 2. ESTIMATING THE BUDGET REQUIRED TO IMPLEMENT THE REQUESTED ACTIVITIES

Before carrying out the budget allocation exercise, the National Agency will calculate the budget required to implement activities requested by each applicant, on the basis of unit costs defined in the Programme Guide and historical data on grants for similar activities.

A standardised estimation cannot be performed for costs that are highly dependent on each specific case, namely exceptional costs. Requests for these types of costs will be assessed based on the description, justification and estimated amount provided by the applicant as part of the application. In addition, beneficiaries can make further requests for these types of costs by submitting a written request to the National Agency. This can be done during the first 6 months of implementation for European Solidarity Corps projects and during the first 12 months of implementation for Erasmus+ projects. Limitations on the amount of additional funds that can be requested may apply, as defined in the grant agreement.

## 3. SETTING THE MAXIMUM GRANT

The National Agency will complete the templates with a method for determining a single maximum grant amount for all applicants. If relevant in its national context, the NA may decide not to set any maximum grant.

In all cases, the awarded grant shall not be higher than the estimated budget required to implement all activities requested by the applicant. As an exception, exceptional costs will not count towards the limits set by the rules on maximum grant.

#### **4. BUDGET ALLOCATION RULES**

The budget allocation will take place in multiple phases. In each phase, the available budget will be divided between eligible applicants based on their score on the relevant criterion. All allocated amounts will be rounded to the nearest whole Euro.

##### **4.1. First phase: minimum grant**

A minimum grant will be provided to each applicant at the beginning of the allocation process. The purpose of the minimum grant is to allow all organisations to implement a sufficient number of activities and progress towards the objectives set in their Erasmus Plan/Activity Plan.

The National Agency will complete the templates with a method for determining a single minimum grant amount for all applicants.

The NAs should advise applicants that, in view of future calls, they should make sure to request an appropriate number of activities according to what they are able to implement. Failing to use up the awarded funds during the duration of the grant agreement (maximum 24 months) can lead to low past performance and therefore a lower grant in future calls.

##### **4.2. Second phase: Qualitative performance**

The purpose of this criterion is to ensure that applicants deliver good quality activities and gradually progress towards the objectives of their Erasmus+/Activity Plan. In addition, this phase includes policy priorities and thematic areas that are of particular importance for the programme.

The budget assigned to this phase will be divided among the applicants in proportion to their score.

The applicant's base score will be equal to the evaluation score of the applicant's accreditation/Quality Label application. In addition, a bonus to the base score will be applied by taking into account the policy priorities score, calculated as an overall percentage across all activity types. The NA can calculate the bonus by using the information received from ESC 51/KA151.

An additional bonus may be used by the NA by taking into account the total estimated budget required to implement the requested activities. By using this criterion the distribution of the budget may be better calibrated to the size of the budget requested.

The overall score for each applicant will be calculated by multiplying the base score with the applicable bonuses<sup>4</sup>.

In future calls, the evaluation results of reports on progress of the applicant's objectives and Erasmus/Activity Plan and the respect of the programmes' quality standards will be taken into account once they are available.

#### **4.3. Third phase: geographical balance (Erasmus+ only)**

The available budget for the geographical balance criterion will be divided among the applicants in proportion to their geographical balance score.

The NA must define a methodology applicable in their country, based on the principle of equal participation opportunities in the Programme. To ensure that an impartial approach is used, quantitative indicators must be used and applicable geographical areas must be clearly defined in a way that allows applicants to know which area their organisation belongs to. The methodology may take into consideration factors such as: past number of participants from each region, past grants to applicants in each region, GDP per capita etc.

### **5. TOTAL AWARDED GRANT AND TARGETS FOR DELIVERY**

For each applicant, the total awarded grant will be the sum of amounts they have received in each allocation phase. If any requests for exceptional costs have been approved by the National Agency, these amounts will be added to the total awarded grant.

Before issuing a grant agreement, the National Agency will calculate appropriate targets for delivery. If the applicant has been awarded the full budget required to implement their requested activities, then the activities requested in the application will become the targets for delivery. If the awarded grant is lower than the full budget required to implement the requested activities, then the targets will also be lowered proportionally to ensure that the applicant is able to deliver them.

The National Agency can make limited modifications to the proportional adjustment in order to allow for a better fit between the awarded budget and target activities, to maintain at least one participant in each activity type requested by the applicant, and to comply with any limitations defined in the Programme Guide.

Beneficiaries are able to implement the target activities with a wide flexibility, while remaining within the scope of their approved Activity Plan. Delivery of agreed activities and targets will be evaluated at the final report stage.

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<sup>4</sup> Excluding the bonuses that would equal zero for a specific applicant.

## Annex 1. Template for rules of budget allocation European Solidarity Corps

*[The information in this template must be published on the website of the National Agency at least 10 calendar days before the deadline for applications. The NA may translate the template.]*

<b>National Agency</b>	<b>CZ01, Czech Republic, Czech National Agency for International Education and Research</b>
<b>Call year</b>	2021

<b>Total budget available for allocation</b>	At least 841.211 EUR (Round 1)
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The budget is apportioned to applicable allocation criteria in the following way:

<b>Minimum grants</b>	At least 150.000 EUR
<b>Qualitative performance and policy priorities and thematic areas</b>	At least 500.000 EUR

<b>Exceptional costs</b>	100.000 EUR
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<b>Minimum grant</b>	All applicants will receive a minimum amount of: 4.500 EUR
	Method: It is based on the average grant per one individual volunteer (12 months) and applicant's feasibility to proceed with the Activity plan.
<b>Maximum grant</b>	An applicant can receive a maximum grant of: 175.000 EUR
	Method: It is based on the cumulative grant/per organisation, the amounts requested by 'top receivers' in 2019 and 2020.

