

Erasmus+ Youth Accreditation

European Solidarity Corps Quality Label

GUIDELINES FOR BUDGET ALLOCATION

Call 2023

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.

As specified in the Programme Guides, at budget allocation stage there is no quality assessment. All eligible grant requests should 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.

The NAs are required to publish the rules of allocation on their websites at least 10 calendar days before the relevant deadline for applications. The NAs may translate the information provided in this document, as appropriate.

1. AVAILABLE BUDGET

The NAs will publish the total budget available for allocation (1), as approved by EAC in the NA Work Programme.

Total budget available for allocation	At least 928 748 €
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For the European Solidarity Corps, the NA may choose to have more than one round, so the amount will be split per each round.

A specific amount will be reserved for budget categories based on reimbursement of real costs (exceptional costs reserve). Beneficiaries can make requests for these types of costs after the grant award, by submitting a written request to the National Agency. For Erasmus+ project this can only be done during the first 12 months of implementation, to facilitate the redistribution process. Limitations on the amount of additional funds that can be requested may apply, as defined in the grant agreement. In case of need, the National Agency may further increase the reserved amount. For ESC, if part of these reserved funds is left unused, the National Agency may distribute it in a second round.

In a second step, the rest of the available budget will be apportioned between the following applicable allocation criteria (2):

Minimum grants	At least 275 000 € (min 25 000 € per projects)
Qualitative performance and policy priorities and thematic areas	At least 613 748 €
Geographical balance (E+ only)	N/A

At least 5% of the total budget should be allocated for minimum grant, at least 40% to qualitative performance and policy priorities and, if applicable, between 5-20% for geographical balance.

The total of the specified amounts for each of the above criteria must correspond to the total budget available, excluding the amount reserved for inclusion support and exceptional costs.

1 If additional funding becomes available, the National Agency may increase the available budget.

2 Exceptionally, the specified amounts may be lowered if the budget required for exceptional costs is higher than originally foreseen; if all applicants have already been allocated the requested amounts according to the rules set out in this document; or if a minor correction is required due to rounding rules.

2- ESTIMATING THE BUDGET REQUIRED TO IMPLEMENT THE REQUESTED ACTIVITIES

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 all cases, the awarded grant shall not be higher than the estimated budget required to implement all activities requested by the applicant.

3- BUDGET ALLOCATION RULES

If the total budget available for allocation is not sufficient to provide each applicant with the budget required to implement their requested activities, then a competitive allocation will take place as described below. However, if the total available budget is sufficient to fully address requests of all applicants, then the budget allocation rules described in this section will not apply.

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. Applicants that receive the full budget required to implement their requested activities (or that reach their maximum grant) will not participate in further allocations. Any surplus funds will be divided among other applicants based on the allocation rules as specified for each phase. All allocated amounts will be rounded to the nearest whole Euro.

3.1. Setting the maximum grant

The National Agency will establish a method for determining a single maximum grant amount, which will be applicable for all applicants. This will act as a funding ceiling and could be determined based on data from previous selection rounds i.e amounts granted to recurrent beneficiaries for a given call year. The maximum grant and the method should be published on the NA website.

If relevant in its national context, the NA may decide not to set any maximum grant.

In addition to the general rules on maximum grants, the awarded grant for applicants under observation may be further limited by the National Agency in accordance with the specific decision on establishment

of observation measures.

The National Agency may also limit the grant awarded to applicants who deviate considerably from the annual targets set in their Activity Plans.

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.

3.2. Setting the 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 Activity Plan.

The National Agency will establish a method for determining a single minimum grant amount, which will be applicable for all applicants. This can be determined based on data from previous selection rounds and absorption rates. The minimum amount to be awarded to each applicant and the method should be published on the NA website.

Grant requests which are estimated to be lower than minimum grant will be fully awarded.

If sufficient funds are available, the National Agency may increase the minimum grant after the submission deadline.

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 can lead to low past performance and therefore a lower grant in future calls.

3.3. Qualitative performance and policy priorities

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

The NA will calculate the score by taking into account the parameters below. The NAs are free to define the exact weighting for each before publishing the information on their websites.

- the evaluation score of the applicant's accreditation/Quality Label application (at least 20% of the score)
- the policy priorities score, calculated based on the number of policy priorities that the applicant will tackle through each activity (at least 10% of the score). The proportion of young people with fewer

opportunities taking part in activities will be factored in for this calculation. This ensures that the inclusive dimension of the programme is reflected in the budget allocation criteria.

- the beneficiary report evaluation score of the last completed accredited project (KA151 or ESC51), if available (at least 50% of the score).

The total score for qualitative performance and policy priorities will be calculated per activity and averaged per project.

The budget assigned to this phase will be divided among the applicants in proportion to their total score. The calculation will take into account the total estimated budget required to implement the requested activities (3). This ensures that the calculated grant is proportional to the size of the budget requested by each applicant.

3.4. Geographical balance (Erasmus+ only, optionally)

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.

4. 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.

³ Excluding the scores that would equal zero for a specific applicant.

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 and Programme Guide rules. Delivery of agreed activities and targets will be evaluated at the final report stage.