



Erasmus+ Teacher Academies 2025

The funding mechanism and budget table Lump Sum Type II grants

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

- ✓ The proposal must provide a detailed estimation of costs and the split of the lump sum budget per WP and per beneficiary
- ✓ The amounts per WP and beneficiary are inserted in an Excel table available with the application form. The grant calculated per WP and beneficiary becomes the budgetary annex 2 of the grant agreement.
- ✓ Balance payment will be made on the basis of the delivery and completion of the work packages and deliverables at the final report stage. Evaluation of WPs occurs only after the project is finished!
- ✓ Pre-financing payments 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).





Lump sum grant – Budget allocation

Annex 2 of model grant agreement

	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 activities.
- ✓ has an objective (and expected outcome).
- ✓ can have multiple deliverables (a single activity/task cannot be a WP).

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 10 as an average.
- ✓ Work packages should be designed so that they are completed at different stages.
- ✓ Horizontal work packages (e.g.: management, dissemination, etc.) may be approached differently.

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.

Payments of the EU grant

Duration	Start of project	Mid-term of project (18 months)	End of project (Final report)
3 years	40%	40%*	20%

If a financial capacity check of an applicant shows weak results -> more than one/two pre-financing payment/s



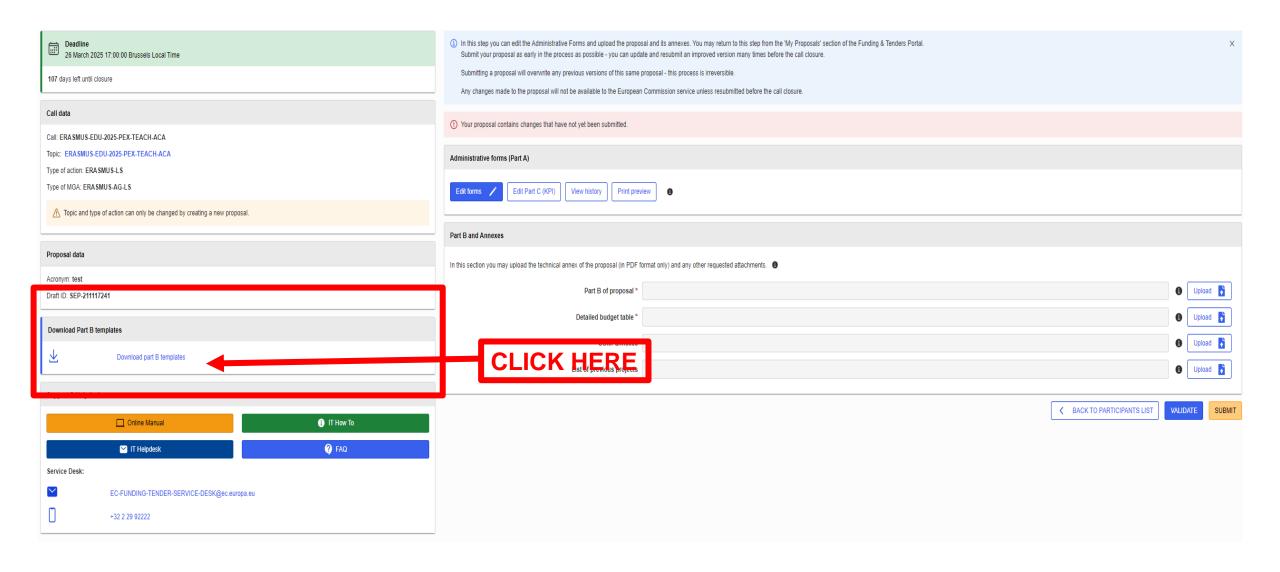
Lump sum – The detailed budget table (Excel)

BE 001			BE 001	BE 001	
DE 001			Vet Organisati	DE 001	
Vet Organisation AAA		UNITS	COST PER UNIT	BENEFICIARY TOTAL COSTS	BE+AE TOTAL COST
	Total WORK PACKAGES:			46.652	46.65
A.	DIRECT PERSONNEL COSTS			20.000	20.00
	A1. Employees (or equivalent) person months			20.000	20.00
	Manager	50	400	20.000	20.00
	Teacher/researcher			-	-
	Technical			-	-
	Administrative			-	
	Other			-	-
	A.2 Natural persons under direct contract			-	-
	A.3 Seconded persons			-	-
	A.4 SME Owners without salary			-	-
ı	A.5 Volunteers			-	-
В.	Subcontracting costs			-	
C. I	Purchase costs			23.600	23.60
	C.1 Travel and subsistence per travel or day			3.600	3.60
	Travel	6	200	1.200	1.20
	Accommodation	6	200	1.200	1.20
	Subsistence	12	100	1.200	1.20
	C.2 Equipment (please refer to the Depreciation Cost sheet)			-	-
	C.3 Other goods, works and services			20.000	20.00
	Consumables			-	
	Services for Meetings, Seminars			-	-
	Services for communication/promotion/dissemination			-	
	Website			-	
	Artistic Fees			-	
	Other (please specify details under worksheet "Comments")	1	20.000	20.000	20.00
Ď.	Other cost categories			-	•
	D.1 Financial support to third parties			-	1
TO	TAL DIRECT COSTS INCLUDING SUBCONTRACTING (A+B+C+D)			43.600	43.60
				-	
E. I	ndirect costs 7% (rounded to zero decimals)			3.052	3.05
				-	
TO	TAL COSTS (A+B+C+D+E) -			46.652	46.65

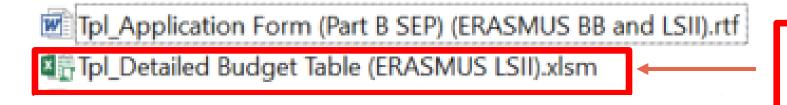
- ✓ Focus on units/input
- ✓ How to manage your lumpsum grant
- ✓ Travel, hotel, per diem. See C(2021) 35
- ✓ Volunteers. See <u>C(2019)</u>
 2646
- ✓ SME owners. See <u>C(2020)</u>
 7115
- ✓ Annotated grant agreement
- ✓ Financial support to third parties: NOT ELIGIBLE

How to fill in the detailed budget table

1. Where to find the detailed budget table



1. Where to find the detailed budget table



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



2. Presentation of the Excel table

Instructions

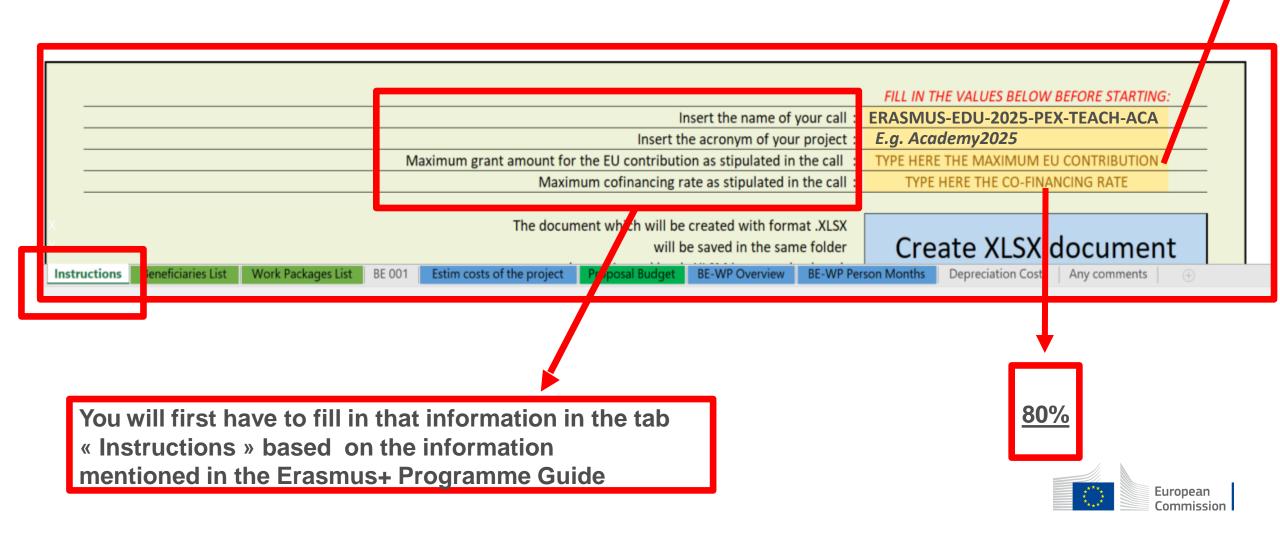
1	This workbook for Lump Sum calculation must be uploaded in the Submission system as a mandatory document in annex to						
	the application.						
	Please note that if you do not upload the fully completed Excel workbook as an annex, the application cannot be submitted						
	(the system will not allow 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 recommend using Eyeal 2010 or more recent						
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 budget 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 Earties.						
	To add beneficialtes, 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**

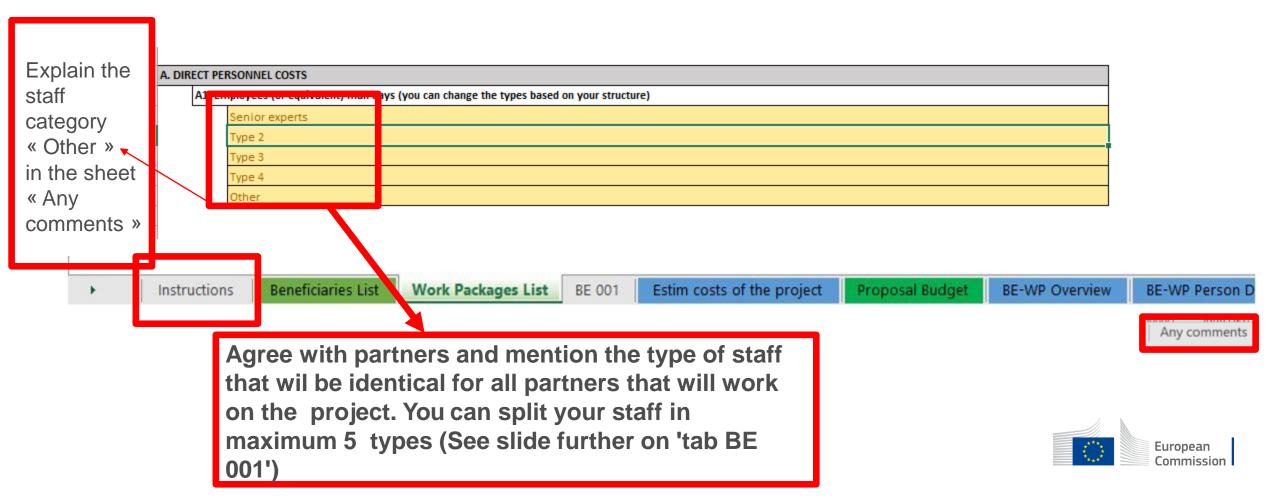


2. Presentation of the Excel table

EUR 1.500.000



2. Presentation of the Excel table

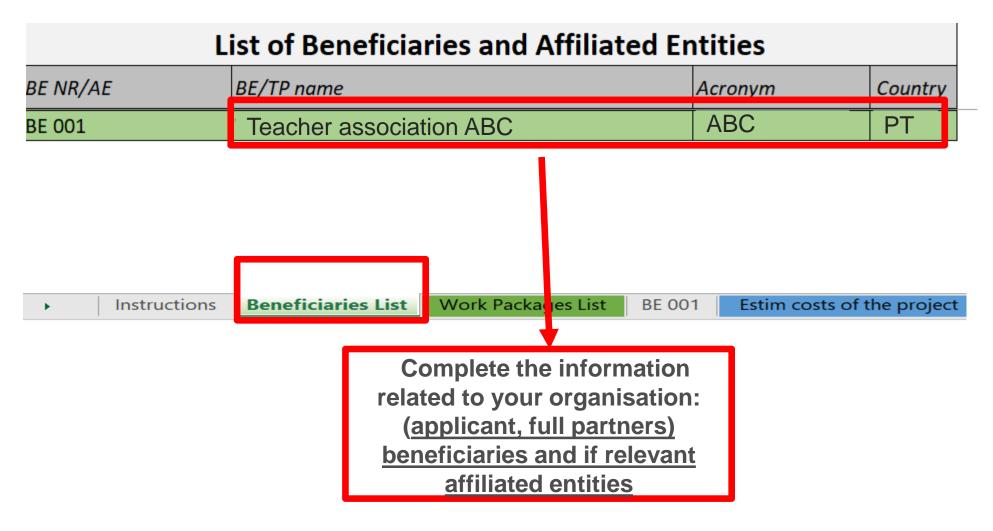


Instructions

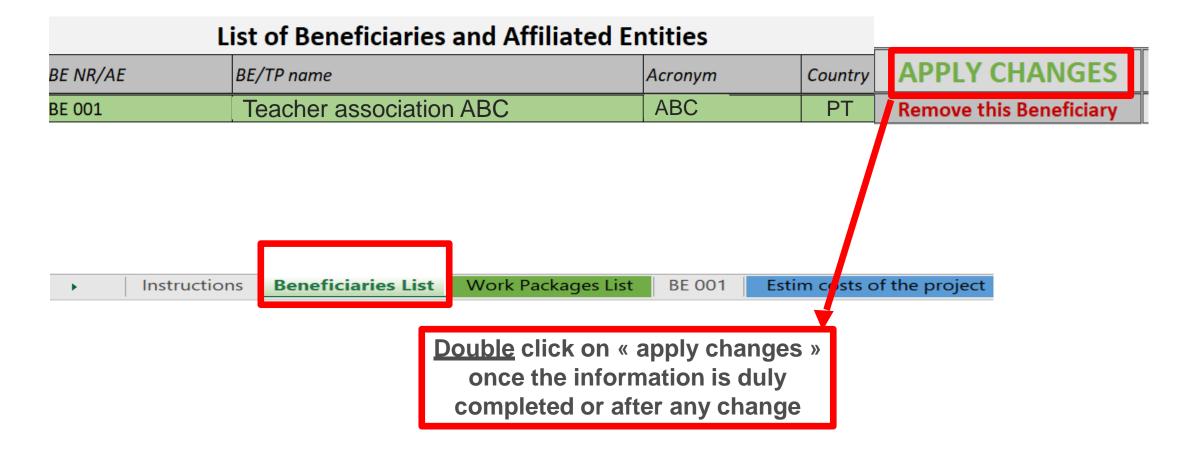
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	column of the 'Proposal Budget' sheet with the Requested EU Grant Amount						
7	You first need to start filling in the sheet 'Beneficiaries list' where you are asked to enter all participants in the project including any Affiliated Entities.						
	To add beneficiaries, please double-click on 'Add a Beneficiary'; to add an affiliated entity, please, double-click 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 the Work Package.						
	To add a work package, please double-click on 'Add a Work Package'.						
9	Once you have completed the 'Beneficiaries List' and 'Work Package list' sheat, or each time you add or remove a						
	beneficiary or a work-package, you must double-click on one of the "Apply changes" buttons to generate the related						
	sheets in the Excel Workbook.						
1	At this stag your spreadsheet is ready to be edited Beneficiary by Beneficiary (BE XXX) for II the workpackages						
In	structions Beneficiaries List Work Packages List BE 001 Estim costs of the project Proposal Budget BE-WP Over						

These 4 tabs will have to be filled in in order for your **Detailed** budget table to be complete, before uploading it into the **Submission** system

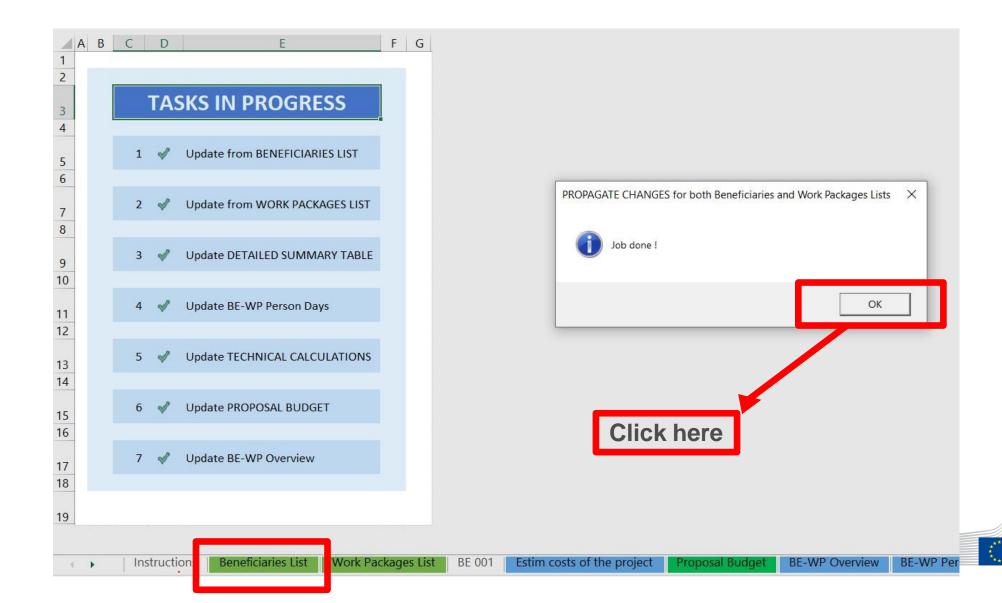






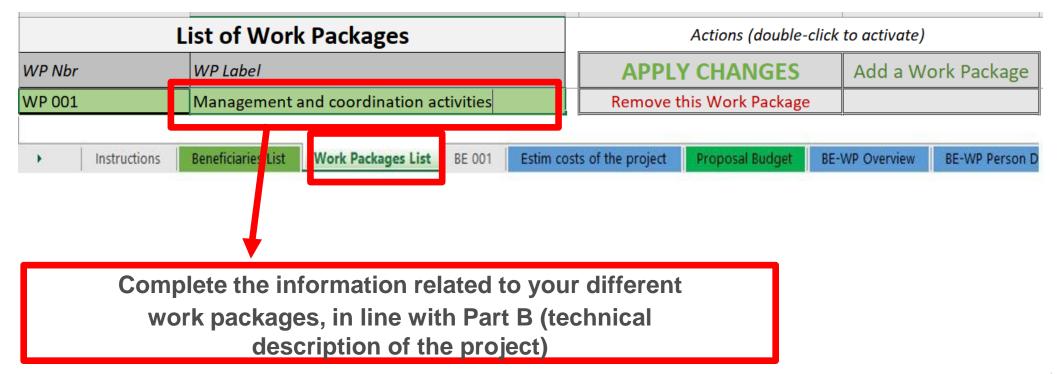






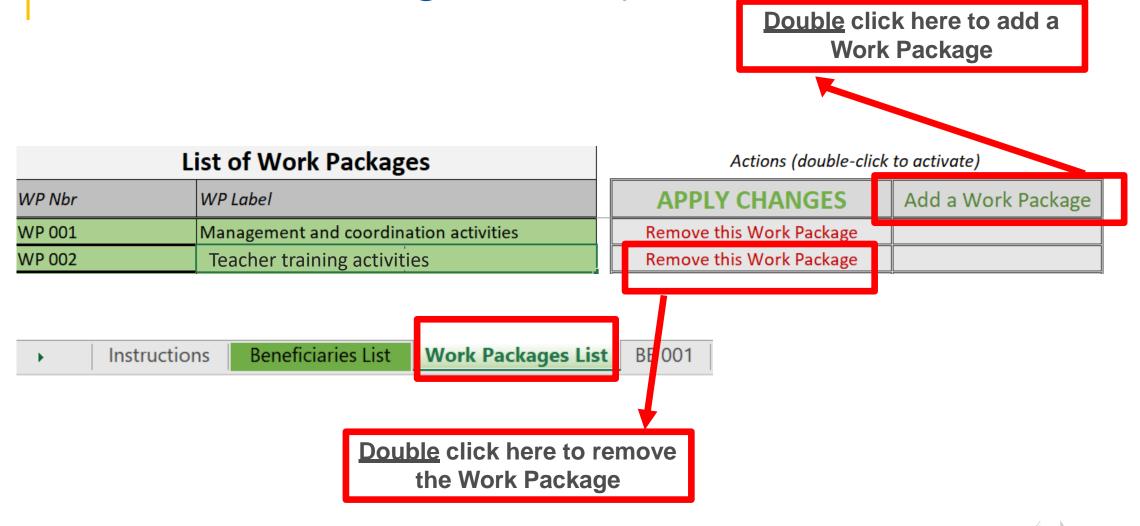
European Commission

4. Work Packages list



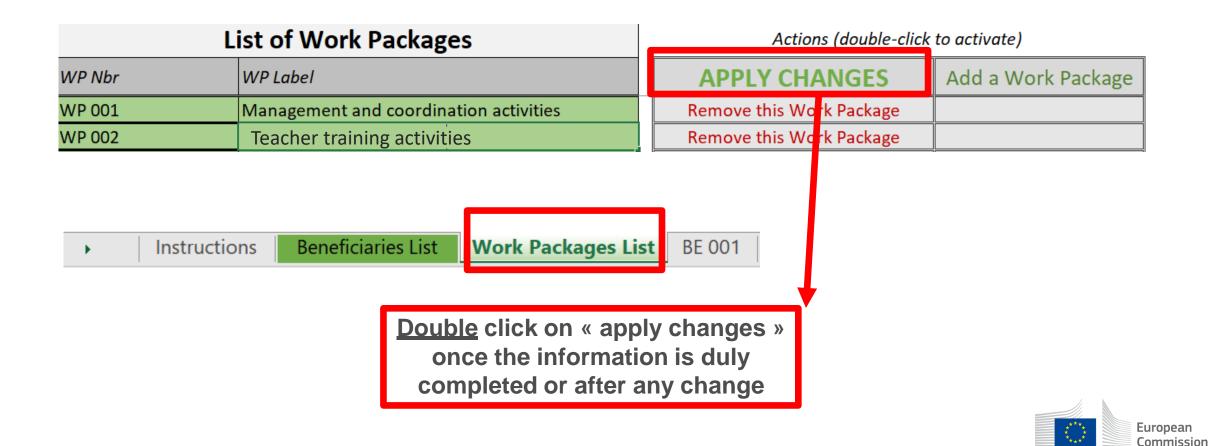


4. Work Packages list 2)

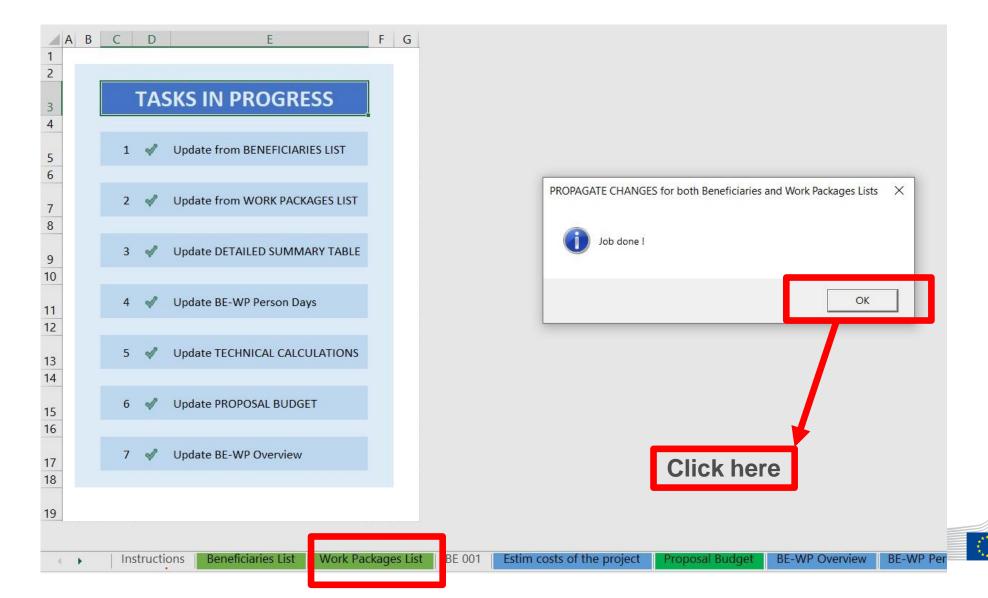




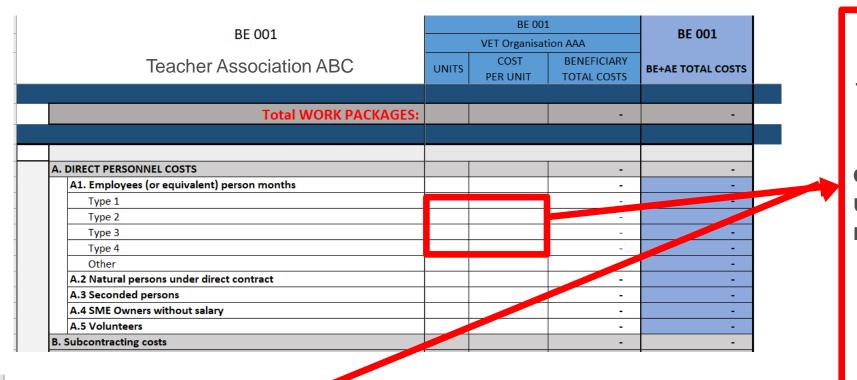
4. Work Packages list (3)



4. Work Packages list (4)



European Commission



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

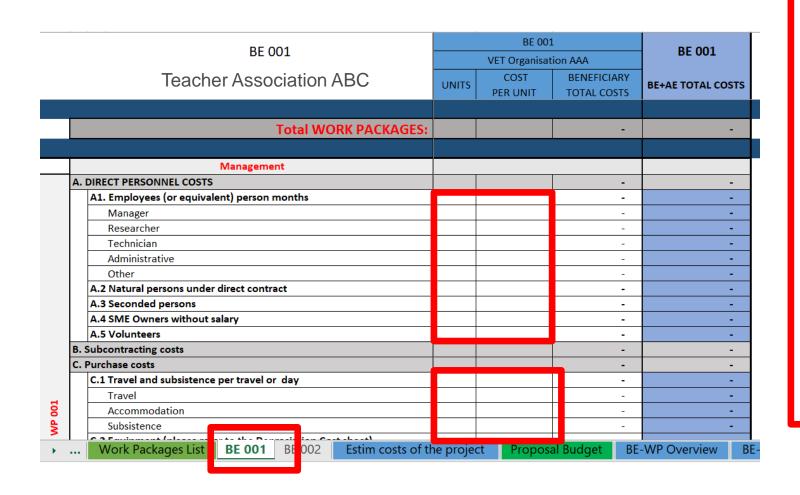
You first have to calculate average amounts if you have different costs per staff member

A	A. DIRECT PERSONNEL COSTS						
	A1. Employees (or equivalent) man day (you can change the types based on your structure)						
	Senior experts						
	Type 2						
	Type 3						
	Type 4						
	Other						



Cells that need to be BE 001 filled in BE 001 BE 001 **VET Organisation AAA** COST **BENEFICIARY Teacher Association ABC** UNITS BE+AE TOTAL COSTS **PER UNIT TOTAL COSTS** For each cost (line) Reference to **Total WORK PACKAGES:** both columns have to the Work be filled in Management **Package** A. DIRECT PERSONNE A1. Employees (or equivalent) person months The other columns will Researcher Just go down Technician be automatically Administrative in the Excel calculated Other A.2 Natural persons under direct contract sheet to see A.3 Seconded persons A.4 SME Owners without salary the other Work A.5 Volunteers B. Subcontracting costs **Packages** Purchase costs 1 Travel and subsistence per travel or day Travel You have to fill Accommodation Subsistence in the ------Work Packages List **BE-WP Overview** BE 001 estimated Reference to the **Beneficiary** actual cost per All costs linked to this European **Work Package** Commission Beneficiary have to be put

in this tab



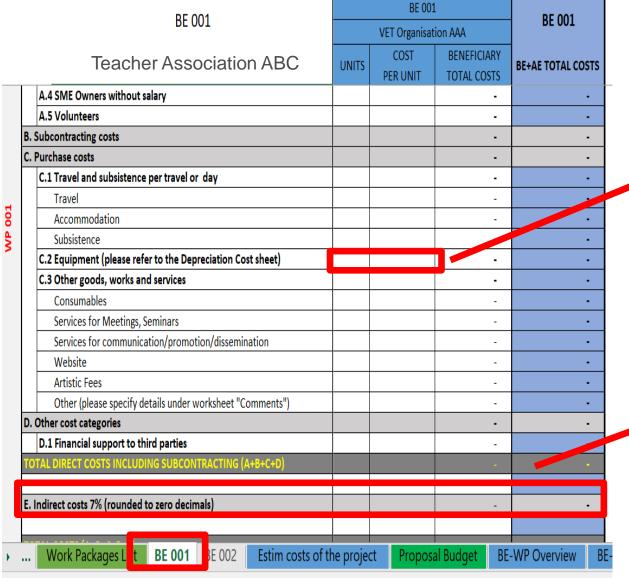
If you have a cost (line) with different costs per unit, you have first to calculate an average amount in order to fill in the cells. Decimals are allowed.

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 Model Grant Agreement

Then repeat this procedure to the other Work Packages below





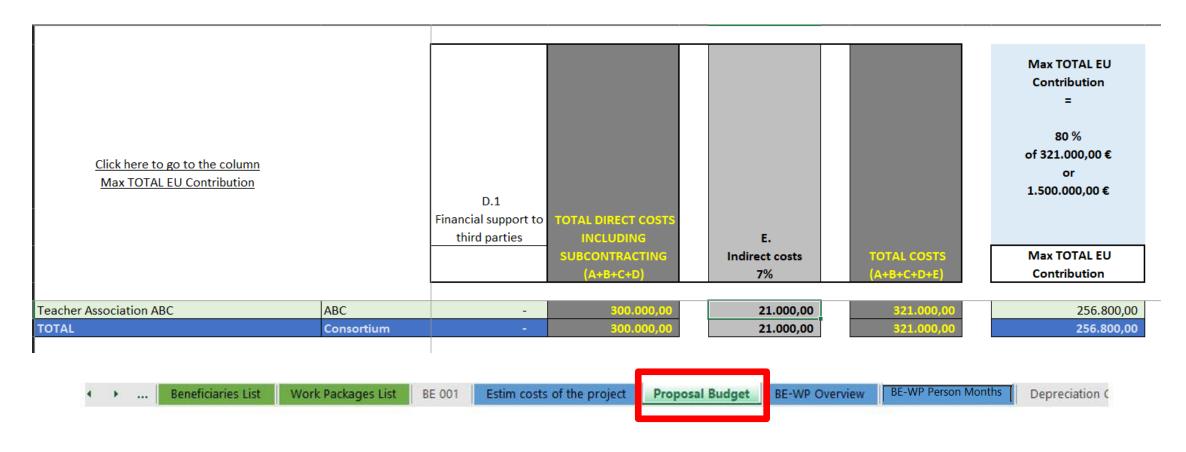
Most of the projects cannot declare equipment costs as they are already included in the indirect costs

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.)



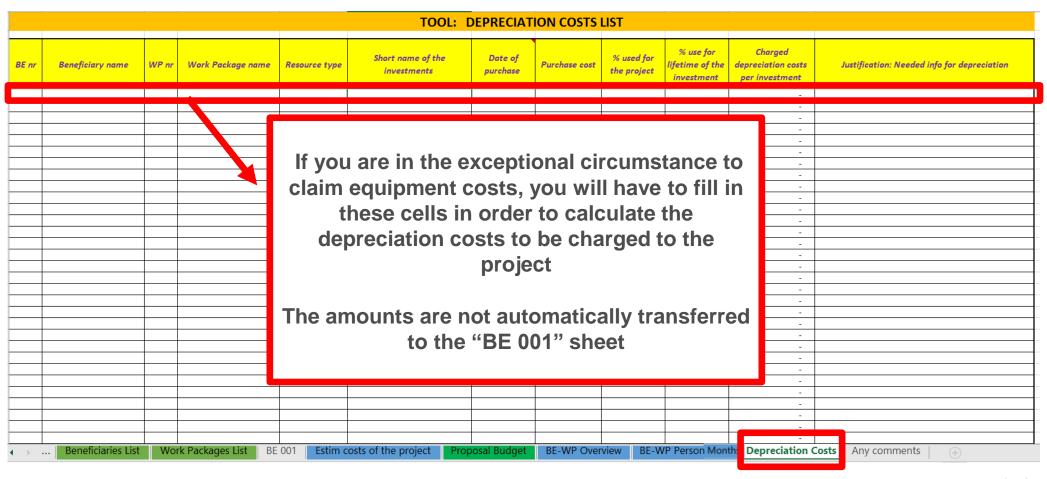
6. Proposal Budget



Based on the costs you inserted, in the Proposal budget tab, the Max EU total contribution will be calculated in this table.

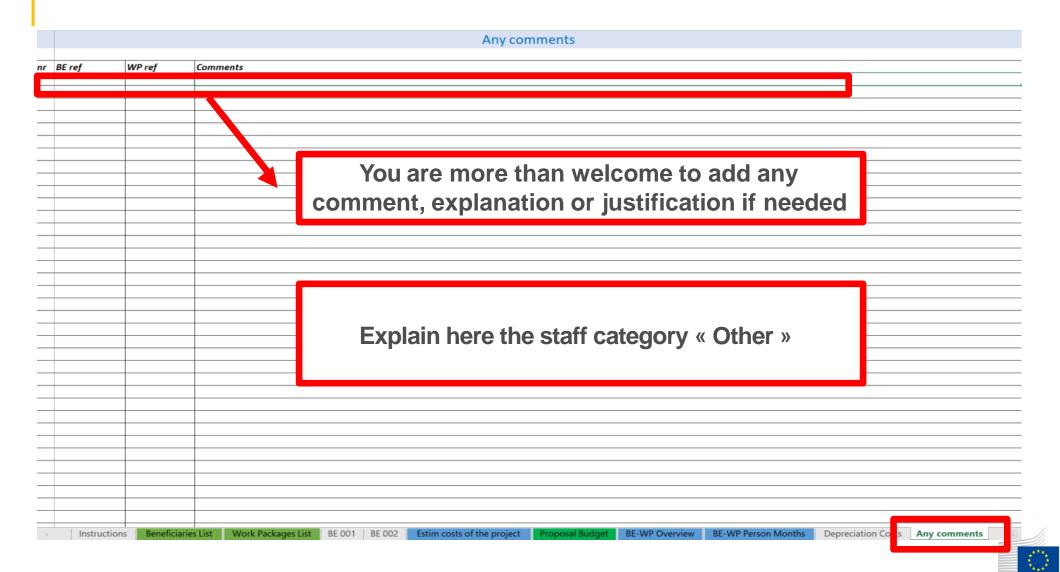


7. Complementary information





7. Complementary information (2)



8. Upload the file in the application (1)

Estim costs of the project

eneficiaries List

Work Packages List BE 001 BE 002

·	
	FILL IN THE VALUES BELOW BEFORE STARTING:
Insert the name of your call:	ERASMUS-EDU-2024-PEX-TEACH-ACA
Insert the acronym of your project:	E.g. European Teacher Academy 2024
Maximum grant amount as stipulated in the call :	1.500.000,00€
Maximum co-financing rate as stipulated in the call:	80,00%
The document which will be created with format .XLSX will be saved in the same folder where this workbook .XLSM is currently placed.	Create XLSX document Double-Click to activate
u can customize here the categories of Employees that correspond to your organisation (example: Seniese, note that this definition is common to all Work Packages for all Beneficiaries.	Go back to the first tab « Instruction » and double click on « Create XLSX
A1. Employees (or equivalent) man days (you can change the types based on your structure)	
Manager	document» in order to
Researcher/teacher	save this Excel file on your
Technician	•
Administra ive	computer

8. Upload the file in the application (2)

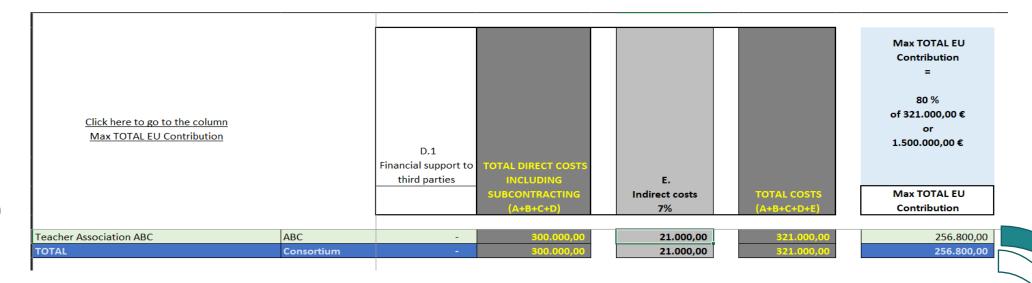
Part B and Annexes					
In this section you may	upload the technical annex of the proposal (in PDF format only) and any other reques	sted	attachments. 🚱		
Part B		0	Upload 🕰		
Detailed budget table LSII		0	Upload 🕰		

The budget table can be uploaded as Excel file (XLSX format)



9. Insert the grant amount in Part A

Proposal budget in the detailed budget table (Excel file)



3 - Budget

Budget section of Part A (eForm)

No	Name of Beneficiary	Country	Requested grant amount
1	Teacher Association ABC	PT	256800,00
	Total	256800,00	

Common mistakes and solutions

- ✓ Difference between total costs and EU grant amount
 The EU grant amount corresponds to 80% of the total costs. For example, if the total costs are EUR 1.375.000, the grant amount is EUR 1.100.000.
- ✓ It is difficult to define staff categories among different organisations
 All partners must have identical commonly agreed names for each staff category.
- ✓ The budget in Part A is not filled in

 Make sure to fill in the Budget section in Part A. The amounts should correspond to those included in the detailed budget table (Excel file).
- ✓ In Part B, shall I fill in the sections where it is indicated 'n/a for prefixed Lump Sum Grants'?

 No, this part does not need to be completed
- ✓ In Part B, do I need to fill in the sections where it is mentioned 'n/a for Lump Sum Grants'? No, you should not fill in these sections, as it is not applicable for any type of Lump Sum Grants, including Lump Sum type II.



Thank you



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