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Erasmus+ KA171 Manual

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Procedures, roles and financial arrangements for KA171 mobilities at Vrije Universiteit Amsterdam

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1 Introduction

Erasmus+ KA171 is a funding action under the Erasmus+ programme that supports mobility between higher education institutions in **Programme Countries** (mostly EU/EEA member states) and **Partner Countries** (third countries not associated with the Erasmus+ programme). Under KA171, institutions submit project applications for the mobility of students, for study or traineeship, and of staff, for teaching or training, between their own institution and partner universities in these third countries.

This manual sets out the procedures, roles, responsibilities and financial arrangements that apply to Erasmus+ KA171 projects at Vrije Universiteit Amsterdam (VU Amsterdam). All staff involved in KA171 projects are required to read this manual, to follow the procedures described in it and to comply with the applicable Erasmus+ and VU Amsterdam regulations. **Adherence to the financial procedures set out in this manual is mandatory.**

2 Roles and responsibilities at VU Amsterdam

This chapter describes the roles involved in the implementation of KA171 projects at VU Amsterdam and the responsibilities attached to each role.

2.1 Head of International Mobility

The Head of International Mobility bears final responsibility for the Erasmus+ KA171 budgets.

2.2 Erasmus+ Coordinator

The Erasmus+ Coordinator is responsible for the institutional management of KA171 projects. This includes ensuring compliance with Erasmus+ regulations, coordinating project applications and reporting, overseeing the budget and supporting the Country Coordinators throughout the project lifecycle.

2.2.1 Administrative and financial responsibilities

The Erasmus+ Coordinator:

- Sends an internal call of interest to all interested parties within VU Amsterdam after the National Agency has announced the Call.
- Informs the Country Coordinators in December about the procedures, their responsibilities and the input required for the institutional application.
- Submits the institutional application before the deadline set by the National Agency (usually mid-February).
- Monitors the progress of the mobilities together with the Country Coordinators.
- Participates in the monitoring meetings with the National Agency, which usually take place in spring and autumn to ensure that the budget is used optimally, and requests input from the Country Coordinators in advance of these meetings.
- Submits the interim report after 18 months (for a project duration of 36 months), no later than 31 January. The interim report reviews the status of the projects and, where applicable, requests the second instalment of the grant, which the National Agency transfers to VU Amsterdam based on the interim report and the progress of the project.

- Checks the R-numbers four times per year together with the Project Controller to verify that they match the information in the Beneficiary Module.
- Finalises the final report, collects the required signatures and submits the final report in August.
- Receives the notification of the final award from the National Agency.
- Instructs SOZ Finance to transfer any remaining budget back to the EU.

2.3 Erasmus+ Grant Administrator

The Erasmus+ Grant Administrator is responsible for the administrative management of Erasmus+ KA171 mobility grants. The Erasmus+ Grant Administrator ensures that all participant documentation is complete and compliant, that grants are calculated and processed correctly, that mobility records are maintained accurately and that reporting requirements are fulfilled in accordance with Erasmus+ regulations and VU Amsterdam procedures.

2.3.1 Administrative and financial responsibilities

The Erasmus+ Grant Administrator:

- Calculates the individual grants.
- Sends the Mobility Agreement and the Grant Agreement to the individual staff participants and/or the Country Coordinator.
- Sends the Learning Agreement and the Grant Agreement to the individual student participants.
- Checks the documents submitted by the participants.
- Ensures that all mobilities and all required reports and surveys are entered in the Beneficiary Module before the closing date of the current Call.
- Calculates the final individual grant on the basis of the Certificate of Participation. The dates on the certificate must match the dates agreed in the Grant Agreement; any difference may affect the grant awarded.

2.4 Country Coordinator

The Country Coordinator is responsible for the successful implementation of a KA171 mobility project within the assigned country or partnership. The Country Coordinator ensures the academic and administrative coordination of the project, the effective use of project funding, compliance with Erasmus+ regulations and the delivery of the planned mobility activities.

2.4.1 General administrative and financial responsibilities

The Country Coordinator carries out the project and is responsible for its overall financial management. For each project, SOZ assigns a specific R-number on which all income and expenditure of the project is recorded. At the start of the project, 80% of the grant is transferred to this R-number; the remaining 20% (or less, depending on the expenditure) is transferred at the end of the project.

The Country Coordinator:

- Keeps track of the expenditure per mobility and ensures that the allocated grant amount is not exceeded.
- Approves or rejects in SAP the invoices booked on the R-number of the project.
- Monitors the expenditure on the R-number via SAC (see the separate [SAC manual](#)).
- Accounts for all income and expenditure of the project.

2.4.2 Responsibilities before, during and after the mobility

The Country Coordinator is the main point of contact for incoming and outgoing staff participants for all information, declarations and related matters.

Before the mobility, the Country Coordinator:

- Approves all individual Grant Agreements.
- Informs the participants of the assigned R-number and of the procedure for the declaration of costs.

During the mobility, the Country Coordinator:

- Monitors the mobilities in collaboration with the Erasmus+ Coordinator.
- Provides input in advance of the monitoring meetings between the National Agency and the Erasmus+ Coordinator, which usually take place in spring and autumn to ensure that the budget is used optimally.

After the mobility, the Country Coordinator:

- Provides input for the final report no later than 31 July.
- Closes the project in collaboration with the Erasmus+ Coordinator.

2.5 Project Controller

The Project Controller is responsible for ensuring the financial integrity and compliance of Erasmus+ KA171 projects. The Project Controller oversees the project budgets, monitors financial transactions, verifies the correct allocation of costs and supports accurate financial reporting in accordance with Erasmus+ requirements and VU Amsterdam financial procedures.

2.5.1 Administrative and financial responsibilities

The Project Controller:

- Creates the R-numbers on an annual basis.
- Performs financial checks to verify that all mobilities are booked on the correct R-number.
- Transfers amounts to the correct R-number where necessary.
- Checks the R-numbers four times per year together with the Erasmus+ Coordinator to verify that they match the information in the Beneficiary Module.

3 Start of a KA171 project

This chapter describes the steps from the opening of the Call to the selection of staff. The party responsible for each step is indicated in the heading of the relevant section.

3.1 Opening of the Call and application (responsible: Erasmus+ Coordinator)

The National Agency Erasmus+ (Nuffic) publishes an annual call for proposals for KA171 around November or December. Around November, the Erasmus+ Coordinator sends an internal call of interest to all interested parties within VU Amsterdam. The input received is reviewed by an International Mobility (IM) committee, which selects the successful internal applicants to participate as Country Coordinators in the new Call.

In December, the Erasmus+ Coordinator informs the selected Country Coordinators about the procedures, their responsibilities and the input required for the institutional application. All Country Coordinators submit their input for the institutional application by mid-January. The Erasmus+ Coordinator then submits the institutional application before the deadline set by the National Agency (usually mid-February).

3.2 Budget allocation (responsible: National Agency)

Between March and July, the National Agency informs VU Amsterdam of the provisionally allocated budget per project. The Erasmus+ Coordinator informs the Country Coordinators accordingly.

At the start of the Call, the National Agency transfers 80% of the allocated budget to VU Amsterdam. This amount is divided among the R-numbers of the individual projects. For example, if €10,000 is allocated to a project, €8,000 is initially transferred to the corresponding R-number. Provided that at least 70% of the budget has been spent at the time of the interim report to the National Agency, the remaining 20% is transferred at that stage. Otherwise, the remaining 20% (or less) is requested upon completion of the Call, on the basis of the expenditure, and credited to the project.

In principle, the budget allocated to a project cannot be used for other projects. Exceptions are set out in the Erasmus+ International Credit Mobility (ICM) handbook, which the Erasmus+ Coordinator shares with all Country Coordinators at the start of the project. Any exception requires prior approval, in consultation with the Erasmus+ Coordinator and the National Agency.

3.3 Inter-Institutional Agreement (responsible: Erasmus+ Coordinator and Country Coordinator)

The first step after the budget allocation and the transfer of funds is the conclusion of an Inter-Institutional Agreement (IIA) between VU Amsterdam and each partner institution. The IIA is the official contract that sets out the arrangements for the exchange of students and/or staff, as well as practical matters such as contact persons, the provision of information and the distribution of Organisational Support (OS) funds. The following applies:

- For each country, a Country Coordinator is assigned both within VU **and** at the partner university.

- The Country Coordinator and the contact person at the partner institution agree on the dates and the content of the visits or exchanges.
- The Country Coordinators complete the IIA. The IIA is signed on behalf of VU Amsterdam by the Erasmus+ Coordinator, who is mandated to do so by the Executive Board, **and** on behalf of the partner institution by the designated responsible person (usually a member of the Executive Board).

3.4 Identification of staff for staff exchange (responsible: Country Coordinator)

The approach to identifying staff may differ per country, depending on the existing cooperation between VU Amsterdam and the partner institution. For example:

- In Kenya, CIS-VU already had an ongoing project to which the Erasmus+ project was linked. Staff members who were already involved in that project were able to make use of the exchange.
- In Bhutan, no collaborative relationships between academics existed yet. Both VU Amsterdam and the Royal University of Bhutan (RUB) therefore issued internal calls for interested staff, who were then able to express their interest to the Country Coordinator.

3.5 Selection of staff (responsible: Country Coordinator)

The selection of staff follows the steps below:

1. The Country Coordinator requests a CV and a cover letter from each interested staff member.
2. The Country Coordinator forwards these documents to the Country Coordinator at the host institution.
3. The host institution verifies internally whether the faculty or department concerned is interested in receiving the staff member.

4 Practical matters for outgoing staff

4.1 Required documents

As soon as the mobility has been planned, the participant completes the Mobility Agreement and the Grant Agreement with the assistance of the Country Coordinator.

Documents before the mobility

VU Amsterdam staff members complete the following two documents:

- Mobility Agreement.
- Grant Agreement, stating the R-number.

Both documents are sent to the Erasmus+ Grant Administrator, who checks the documents, enters the mobility in the Beneficiary Module and adds the mobility activity code on the Grant Agreement.

Documents after the mobility

VU Amsterdam staff members complete the following two documents:

- EU Participant Survey. At the end of the mobility, the participant receives a link to the online EU Participant Survey, which must be submitted to complete the online file.
- Certificate of Participation. At the end of the exchange, the host institution signs a Certificate of Participation confirming the dates of the exchange. The participant sends the Certificate of Participation to the Erasmus+ Grant Administrator.

4.2 Other practical matters

- VU Amsterdam staff members are responsible for arranging their own travel, visa and accommodation.
- VU Amsterdam staff members are advised to book their travel via [ATPI](#).
- VU Amsterdam staff members must comply with the [VU Travel Policy](#).

5 Practical matters for incoming staff

5.1 Required documents

As soon as the mobility has been planned, the participant completes the Mobility Agreement and the Grant Agreement with the assistance of the Country Coordinator.

Documents before the mobility

Incoming staff members complete the following two documents:

- Mobility Agreement.
- Grant Agreement, stating the R-number.

Both documents are sent to the Erasmus+ Grant Administrator, who checks the documents, enters the mobility in the Beneficiary Module and adds the mobility activity code on the Grant Agreement.

Documents after the mobility

Incoming staff members complete the following two documents:

- EU Participant Survey. At the end of the mobility, the participant receives a link to the online EU Participant Survey, which must be submitted to complete the online file.
- Certificate of Participation. At the end of the exchange, the host institution signs a Certificate of Participation confirming the dates of the exchange. The participant sends the Certificate of Participation to the Erasmus+ Grant Administrator.

5.2 Other practical matters

Upon request, the Country Coordinator may assist incoming staff members in finding accommodation and in applying for a visa and insurance. Outgoing VU Amsterdam staff members make their own arrangements for travel, visa and accommodation (see section 4.2). The following also applies:

- Visa costs are borne by the participant.
- For incoming mobilities of up to 90 days, participants apply for a visa themselves. The Country Coordinator can provide an invitation letter if necessary.

- For incoming mobilities from 90 days onwards, the Country Coordinator can refer staff members to immigration@vu.nl for visa assistance.
- If a traveller does not have their own (or sufficient) insurance, insurance can be arranged through the SOZ secretariat or directly via AON. The costs are deducted from the traveller's grant, in consultation with the traveller.
- If a traveller requests that accommodation be booked on their behalf, the Country Coordinator can book the accommodation on the R-number of the project. The costs are deducted from the traveller's grant, in consultation with the traveller.
- Travellers may also request additional services, such as:
 - arranging an airport pick-up;
 - purchasing certain books;
 - organising a welcome tour of Amsterdam;
 - purchasing an OV-chipkaart (public transport card).

If such services are agreed with the traveller in advance, the costs are likewise deducted from the traveller's grant.

6 Individual grants, maximum amounts and declaration procedure

The individual grant is based on the Grant Agreement, which is the formal contract between VU Amsterdam and the participant. The Grant Agreement specifies the approved mobility period, the grant amount, the payment arrangements, the reporting obligations and the terms and conditions applicable to the Erasmus+ mobility.

6.1 Calculation of grants

- The grant consists of (i) a fixed contribution towards travel costs and (ii) an individual support allowance based on the number of days of the mobility, to which a maximum of two travel days may be added.
- The maximum amount that can be declared is the grant amount awarded in the Grant Agreement.

6.2 Payment procedure for outgoing staff

- The Grant Agreement specifies the grant amount, the name of the traveller and the mobility code.
- At the request of the Country Coordinator, SOZ Finance transfers the funds to the relevant department or faculty. The participant then claims the travel expenses in accordance with the VU Amsterdam policy for the reimbursement of expenses of internal staff.
- The participant declares **the travel costs** via [Reimbursement of expenses for internal employees](#).
- The Erasmus+ grant is intended as a contribution towards expenses and does not necessarily cover all costs. If the claimed travel expenses are lower than the grant amount, the remaining balance stays with the department or faculty. If the expenses exceed the grant amount, the difference is covered by the department or faculty. The traveller must discuss this with their supervisor.

6.3 Payment procedure for incoming staff

- The Grant Agreement specifies the grant amount, the bank account number, the name of the traveller and the mobility code.
- The grant is paid directly into the traveller's personal bank account. Alternatively, the home university may receive the grant and transfer it to the traveller.
- VU Amsterdam may choose to prefinance certain costs, such as accommodation, insurance or flight tickets. These costs are first deducted from the grant amount.
- The Country Coordinator books prefinanced costs on the correct R-number. If costs have initially been booked on a different number, the Country Coordinator corrects this at a later stage.
- SOZ Finance processes the payment of the remaining grant to the traveller. To initiate the payment, the Country Coordinator sends the payment instruction to SOZ Finance, which forwards it to FSC-Betalingsopdrachten.

6.4 Costs exceeding or falling below the grant amount

- If the travel and accommodation costs exceed the grant awarded by Erasmus+, the additional costs are borne by the staff member (incoming or outgoing). In consultation with the head of department, the additional costs may be covered by ongoing capacity building projects of VU Amsterdam or of the relevant faculty.
- If the grant awarded exceeds the costs incurred, the faculty or department may retain the remaining amount.

7 Student mobilities

Student mobilities comprise both incoming and outgoing students, for study and for internship. The Country Coordinator selects the students and provides their email addresses to the Erasmus+ Grant Administrator, who sends the students the appropriate documents. Once the documents have been completed, signed and returned, the grant is calculated through the Beneficiary Module. The Erasmus+ Grant Administrator enters the student in the Beneficiary Module and the grant in SAP.

Students receive 70% of the grant in advance and the remaining 30% upon completion of the mobility, provided that all obligations have been met and the final documents have been submitted. For incoming students, it is often more practical to transfer the advance payment (70%) only once they have opened a bank account in the Netherlands. PhD students cannot be paid via SAP; in that case, SOZ Finance is requested to transfer the amount to the PhD student.

7.1 Required documents for outgoing student mobilities

Documents before the mobility

The student sends the Grant Agreement and the Learning Agreement to the Erasmus+ Grant Administrator. The Erasmus+ Grant Administrator verifies that the courses listed in the Learning Agreement have been approved and signs the Learning Agreement. The Erasmus+ Grant Administrator then processes the data in the Beneficiary Module to determine the correct grant amount, enters the amount in the Grant Agreement and signs the Grant Agreement.

Documents after the mobility

The student completes the following four documents:

- Learning Agreement (after the mobility).
- EU Participant Survey. The student completes the online survey within 30 days after the last day of the mobility. As some incoming participants come from countries with limited internet access, it may be more practical for them to complete the survey while in the Netherlands.
- Certificate of Participation. At the end of the exchange, the host institution signs a Certificate of Participation confirming the dates of the exchange.
- Transcript of Records.

The documents are completed online and/or submitted by email to the Erasmus+ Grant Administrator. The final grant is calculated based on the basis of the Certificate of Participation. The dates on the certificate must therefore match the dates agreed in the Grant Agreement; any difference may affect the grant awarded.

7.2 Payment of outgoing student grants

The Erasmus+ Grant Administrator pays the student grants via SAP-SLM.

8 Organisational Support (OS)

As of Call 2022, VU Amsterdam receives €500 in Organisational Support for every completed mobility. This amount is distributed as follows:

- €150 per mobility is allocated to the partner institution. This is the minimum amount; any other arrangement must be agreed with the Erasmus+ Coordinator.
- Of the remaining €350, €200 is allocated to the department or faculty of the Country Coordinator and €150 to the Credit Mobility department of the International Office.

At the end of the Call, after receipt of the results of the final report and the financial settlement of the project (usually around September or October), the Erasmus+ Coordinator prepares an overview of the OS funds per partner institution and sends this overview to the Country Coordinators. The Country Coordinators then arrange the transfer of the funds to each partner institution by sending a transfer request by email to SOZ Finance, stating the R-number of the project and the bank account details of the partner institution. The Erasmus+ Coordinator requests the financial officer to transfer the remaining OS funds to the department or faculty and to IM.

9 Timeline of processes

The table below summarises the main process steps and their timing.

No.	Process step	Timing
1	Opening of the Call and application	December to January
2	Budget allocation	Start of the Call (summer)
3	Inter-Institutional Agreement	Before the first mobility
4	Identification of staff for staff exchange	From the start of the Call onwards
5	Selection of staff	From the start of the Call onwards
6	Preparation of the staff exchange	At least 3 weeks before the start of the mobility
7	Processing of the staff agreements	Before the start of the mobility
8	Practical matters	At least 3 weeks before the start of the mobility
9	Finance	Before and after the mobility
10	Completion of the exchange	End of the mobility
11	Student exchange	From the start of the Call onwards
12	Interim monitoring	Spring and autumn
13	Completion of the Call	31 July (deadline for input to the Erasmus+ Coordinator)

10 Contact persons

Role	Name	Email address
Head of International Mobility	Maureen van der Meché	m.m.b.vander.meche@vu.nl
Erasmus+ Coordinator	Monique van Reij	internationalrelations@vu.nl
Erasmus+ Grant Administrator	Sandra Wensveen	erasmus@vu.nl
Project Controller	Nichelle Liu	n.y.y.liu@vu.nl
SOZ Finance		SOZ.IO.FIN@vu.nl