

RULES OF BUDGET ALLOCATION FOR ACCREDITED APPLICANTS UNDER ERASMUS+ KEY ACTION 1

This document defines detailed rules of budget allocation for accredited applicants within the framework established in the Erasmus+ Programme Guide.

National Agency	BG01, Bulgaria, Human Resource Development Centre
Field	Adult education
Call year	2024

1. AVAILABLE BUDGET

Total budget available for allocation ¹ :	1 062 693,50 €
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Out of the available budget, at least² the following amounts will be allocated for the specified purposes:

Basic grants and financial performance	504 000,00 €
Qualitative performance and policy priorities	442 524,00 €
Inclusion support for participants and exceptional costs	11 000,00 €

2. ESTIMATING THE BUDGET REQUIRED TO IMPLEMENT THE REQUESTED ACTIVITIES

Based on the funding rules defined in the Programme Guide and historical data on grants for similar activities, the National Agency will estimate the budget required to implement the activities requested by each applicant. For budget categories applying unit contributions, applicants cannot be awarded a grant higher than the resulting estimated budget.

Cost categories 'Inclusion support for participants' and 'Exceptional costs' cannot be estimated in the same way. The National Agency will assess requests for these types of costs based on description and justification included in the application. During project implementation, beneficiaries can make further requests for these types of costs by submitting a written request to the National Agency. The National Agency will process such requests in order of reception, as long as funds remain available.

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

² Specified amounts may be lowered 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.

2.1. Maximum grant³

Based on the budget available and the number of accredited organisations, an applicant can receive a maximum grant of 50 080 euro.

In case of a mobility consortium, the maximum grant will be multiplied by the number of participating organisations (including the coordinator and all consortium members).

The maximum grant rules will apply only if the total demand for budget surpasses the total available funds as defined in section 1.

Cost categories 'Inclusion support for participants' and 'Exceptional costs' will not count towards the maximum grant.

2.2. Competitive allocation

If the total budget available for allocation to accredited applicants is not sufficient to provide each applicant with the budget required to implement their requested activities (or their maximum grant, if applicable), then a competitive allocation will take place as described in section 3. However, if the total available budget is sufficient to fully address the requests of all applicants, then budget allocation rules defined in section 3 will not apply.

3. BUDGET ALLOCATION

Budget allocation will take place in multiple phases. In each phase, the available budget will be divided between eligible applicants based on the criteria described below. For each applicant, the total awarded grant will be the sum of amounts they have received in each allocation phase (and any approved amount for cost categories 'Inclusion support for participants' and 'Exceptional costs').

If any applicant cannot receive further funds based on the rules in this document, then any surplus funds allocated to them will be divided among other applicants using the allocation rules specified for each phase. All allocated amounts will be rounded to the nearest whole Euro.

In this section, references to completed projects concern projects with an end date before 1 September 2023⁴.

3.1. First phase: basic grants and financial performance

All applicants will receive at least the following basic grant: 24 000,00 €

If sufficient funds are available, the NA can increase the basic grant after the submission deadline.

³ Maximum grant for applicants under observation may be further limited by the specific decision on establishment of observation measures.

⁴ Only KA121 projects linked to the accreditation code referenced in the application can be used for tracking past performance. For applicants that have completed only one or two projects, the highest absorbed grant will be determined based on those projects. The National Agency may exclude from consideration past projects that have been negatively affected by events outside of the beneficiary's control (*force majeure*).

3.2. Second phase: qualitative performance and policy priorities

Budget assigned to this phase will be divided among the applicants in proportion to their score and the estimated budget required to implement their requested activities.

The score of each applicant is calculated in two steps:

- a) For applicants that have completed at least one accredited project, the base score will be equal to the final report evaluation score of their last completed accredited project.

For applicants that have not yet completed any accredited projects, the base score will be equal to the evaluation score of their accreditation application.

- b) A bonus to the base score will be applied according to the following criteria:

- Percentage of participants with fewer opportunities in mobility activities out of total participants;
- Percentage of participants in learner mobility, out of total participants in mobility activities.

These criteria will be measured on a scale from 0 to 100% and will be calculated based on each applicant's requested activities and it will be equal to:

- 0 points if the average of the two indicators scores between 0 and 5%;
- 5 points if the average of the two indicators scores between 6 and 50%;
- 10 points if the average of the two indicators scores between 51 and 100%.

The maximum number of bonus points that can be awarded is 10.

The overall score for each applicant will be calculated in the following way: Total score = base score + bonus points. The total score cannot be higher than 100.

4. TARGETS FOR DELIVERY

If the applicant has been awarded the full estimated budget required to implement their requested activities, then the activities requested in the application will become the applicant's targets for delivery and will be included in their grant agreement. If the awarded grant is lower than the estimated budget required to implement the applicant's requested activities, then the targets for delivery will be lowered proportionally so that the awarded grant is sufficient to reach them.⁵

⁵ The National Agency can make limited modifications to the proportional adjustment to allow for a better fit between the awarded grant and target activities, to ensure coherence with the approved Erasmus Plan, to provide adequate support for priority activities, to maintain at least one participant in each activity type and category requested by the applicant, and to comply with rules defined in the Programme Guide.