



Erasmus+ Programme (ERASMUS)

Call for proposals

Partnerships for Innovation: Forward-Looking Projects - Higher Education ERASMUS-EDU-2025-PI-FORWARD-HE

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EUROPEAN EDUCATION AND CULTURE EXECUTIVE AGENCY (EACEA)

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HISTORY OF CHANGES						
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CALL FOR PROPOSAL

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0. Introduction

This is a call for proposals for EU **action grants** in the field of 'Cooperation among organisations and institutions – Partnerships for Innovation – Forward looking projects in Higher Education' under the **Erasmus+ Programme**.

The regulatory framework for this EU Funding Programme is set out in:

- Regulation 2024/2509 (<u>EU Financial Regulation</u>)¹
- the basic act (Erasmus+ Regulation 2021/817²).

The call is launched in accordance with the 2025 Work Programme³ and will be managed by the **European Education and Culture Executive Agency (EACEA)** ('Agency').

The call covers the following topics:

- ERASMUS-EDU-2025-PI-FORWARD-HE-EDPP European Degree Pathway Projects
- ERASMUS-EDU-2025-PI-FORWARD-HE-LD Leadership Development programme for higher education institutions' leaders

Each project application under the call must address only one of these topics. Applicants wishing to apply for more than one topic, must submit a separate proposal under each topic.

We invite you to read the **call documentation** carefully, and in particular this Call document, the Model Grant Agreement, the <u>EU Funding & Tenders Portal Online Manual</u> and the <u>EU Grants AGA</u> — Annotated Grant Agreement.

These documents provide clarifications and answers to questions you may have when preparing your application:

- the <u>Call document</u> outlines the:
 - background, objectives, scope, activities that can be funded and the expected results (sections 1 and 2)
 - timetable and available budget (sections 3 and 4)
 - admissibility and eligibility conditions (including mandatory documents; sections 5 and 6)
 - criteria for financial and operational capacity and exclusion (section 7)
 - evaluation and award procedure (section 8)
 - award criteria (section 9)
 - legal and financial set-up of the Grant Agreements (section 10)

Regulation (EU, Euratom) 2024/2509 of the European Parliament and of the Council of 23 September 2024 on the financial rules applicable to the general budget of the Union (recast) ('EU Financial Regulation') (OJ L, 2024/2509, 26.9.2024).

Regulation (EU) 2021/817 of the European Parliament and of the Council of 20 May 2021 establishing Erasmus+: the Union Programme for education and training, youth and sport (OJ L 189, 28.5.2021, p. 1)

Commission Implementing Decision C(2025) 1334 final of 05.03.2025 concerning the adoption of the work programme for 2025 and the financing decision for the implementation of the Erasmus + Programme.

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- how to submit an application (section 11)
- the Online Manual outlines the:
 - procedures to register and submit proposals online via the EU Funding & Tenders Portal ('Portal')
 - recommendations for the preparation of the application
- the <u>AGA Annotated Grant Agreement</u> contains:
 - detailed annotations on all the provisions in the Grant Agreement you will have to sign in order to obtain the grant (including cost eligibility, payment schedule, accessory obligations, etc).

You are also encouraged to visit the <u>Erasmus+ Project Results</u> website to consult the list of projects funded previously.

1. Background

European Degree Pathway Projects

Higher education institutions across Europe have the potential to be much more competitive globally if they join forces by cooperating with each other and combine their strengths. To boost Europe's open strategic autonomy and high-level knowledge development, it is important for universities to pool resources, knowledge and expertise across the EU through cooperation and transnational degree programmes. This will allow them to better equip future generations with the skills that European societies need to thrive in an ever more interconnected world, including in key strategic areas. As highlighted in the Letta report⁴, the joint European degree is a key cornerstone of a possible fifth freedom, the freedom of education, research, and innovation.

Building on the Council Recommendation on building bridges for effective European higher education cooperation, and the outcomes of Erasmus+ policy experimentation projects⁵, the 2024 Commission Communication on a blueprint towards a European degree⁶, set the vision for a concrete path to make joint programmes more visible, accessible, and integrated across Europe.

The Commission Communication on a Union of Skills⁷ and the STEM Education Strategic Plan⁸ of 5 March 2025 set the ambition for the Union of Skills to offer the highest quality education and training, pooling together resources through transnational and transdisciplinary cooperation. This includes to support the development of joint education programmes in disciplines for strategic sectors and key technological domains and to continue working towards a European degree for engineers.

The Council Resolution on a joint European degree label and the next steps towards a possible joint European degree⁹ adopted on 12 May 2025 invites the Commission and Member States to roll out together a joint European degree as a label as from mid-2026, on the basis of the criteria adopted in the Council Recommendation on a European

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⁴ For the full report, see: Enrico Letta - Much more than a market (April 2024)

⁵ SWD(2024) 74 final

^{6 &}lt;u>COM(2024) 144 final</u>

OM(2025) 90 final

^{8 &}lt;u>COM(2025) 89 final</u>

⁹ C/2025/2939

quality assurance and recognition system ¹⁰. The joint European degree label aims at better identifying and promoting high-quality joint programmes that reflect deep transnational cooperation and strengthens European higher education and its global standing.

The Council Recommendation on a European quality assurance and recognition system precises that the joint European degree label is to be awarded by quality assurance agencies and higher education institutions subject to national or regional external quality assurance at institutional level. Technical implementation guidelines are to be produced by a Policy lab¹¹ in 2026 for a roll-out of the label as from mid-2026.

The effective rollout of a joint European degree label will require coordinated efforts on the part of national/regional authorities and key higher education stakeholders, accompanied by a communication effort and work to identify and remove remaining barriers to joint degrees and joint programmes at national, regional or institutional level, while exploring possible structural solutions such as a joint European degree.

Leadership Development programme for higher education institutions' leaders

The leadership of higher education institutions is crucial for creating inclusive, high-quality and future-oriented higher education systems in Europe. In times, when universities face complexity due to geopolitical climate, policy reforms, financial challenges, market competition, talent retainment, societal expectations, etc. the need for the further development of leadership capabilities becomes evident.

The Commission Communication on a European strategy for universities ¹² highlights the pivotal role of universities in achieving the European Education Area (EEA) and the European Research Area (ERA), in synergy with the European Higher Education Area. The strategy communicates clear expectations that higher education institutions continue to drive Europe's global role and leadership.

The Council Recommendation on attractive and sustainable academic careers in higher education ¹³ highlights the diversity of roles and tasks the academic staff is expected to take. In addition to research, the academic staff is expected to engage in high-quality teaching, innovation, entrepreneurship, transnational cooperation, institutional governance, etc. This entails the development and recognition of a diverse range of academic and professional expertise, starting with parity of esteem between research and teaching. This also implies a broader portfolio and profile for leadership.

The Commission Communication on a Union of Skills¹⁴ points to the need to provide high-quality, inclusive and adaptable education, training and skills systems to address skills shortages, foster talents and increase the EU's competitiveness, the need indicated by the Draghi, Letta, and Niinistö reports. It also argues that pedagogical roles in academia should be revalorised, and additional recognition is needed for innovative teaching, development of lifelong learning and training opportunities through micro-credentials, creating transnational education opportunities or building cooperation with employers.

Therefore, to lead and navigate in changing times, higher education institutions must continue developing academic leadership and transformation capacities. Universities need leaders who have strategic foresight, build resilient institutions, develop

¹¹ See <u>COM(2024) 144 final</u>

¹⁰ C/2025/3006

¹² communication-european-strategy-for-universities-graphic-version.pdf

¹³ Council adopts recommendation on attractive and sustainable careers in higher education - Consilium

¹⁴ COM(2025) 90 final

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sustainable structures, engage people with different career paths and work for continuous improvement of education and training. This call is a response to the pressing need to support the leadership of higher education institutions and motivate leaders to explore real-life dilemmas through cooperation, learning and innovation.

Objectives — Themes and priorities — Activities that can be funded — Expected impact

Forward-Looking Projects are large-scale projects that aim to identify, develop, test and/or assess innovative (policy) approaches that have the potential of becoming mainstreamed, thus improving education and training systems. They will support forward-looking ideas responding to key European priorities. They should give input for improving education and training systems, as well as bring a substantial innovative effect in terms of methods and practices to all types of learning and active participation settings for Europe's social cohesion.

European Degree Pathway Projects

Objectives

This action aims to accompany and support partnerships in designing and implementing the necessary actions to facilitate the rollout of the joint European degree label, promote the joint European degree label and explore the pathway toward a possible joint European degree in all fields including specific disciplines (e.g., engineering).

Themes and priorities (scope)

Proposals must address the 3 following themes:

Capacity building and rollout of the joint European degree label: Focus on embedding the joint European degree label into national and regional education systems and legal environment. This includes strengthening institutional capacities through targeted staff training and the development of sustainable processes for the joint European degree label implementation and management;

Strategic communication and visibility enhancement: Conduct targeted communication and promotion at national, institutional, and sectoral levels to raise awareness and visibility of the joint European degree label;

Cross-border cooperation and regulatory exploration: Encourage cooperative networks and peer learning among national authorities, quality assurance agencies, higher education institutions, student organisations, and social partners. This includes conducting legal and regulatory analyses to assess the feasibility and design of mechanisms for a possible joint European degree.

Activities that can be funded (scope)

Projects are expected to cover a combination of the following activities:

- Design and implement procedures to assess compliance of joint degree programmes with the criteria of the joint European degree label on the basis of the guidelines to be produced by the Policy lab;
- Conduct training activities (such as seminars, workshops, capacity-building sessions) for staff involved in quality assurance or programme accreditation.
- Promote the joint European degree label at national, institutional and/or sectoral

levels, including awareness-raising campaigns, national stakeholder events, and communication strategies to promote the joint European degree label and enhancing visibility and understanding of the joint European degree label among key stakeholders;

- Prepare quality assurance agencies within the European Education Area to assess whether joint degree programmes—or, in the case of self-accrediting higher education institutions, the institutions themselves—comply with the European criteria required to use the European label. This involves identifying the most effective methods to review the work of national quality assurance agencies by integrating compliance checks of joint degree programmes against these European criteria. Additionally, establish the necessary procedures to ensure these assessments are fully implementable by the end of the project period, while contributing to a single shared repository of labelled programme once it is set up at European level.
- Identify and remove barriers (legal, administrative or technical) for the development of transnational joint degree programmes compliant with the criteria of the joint European degree label;
- Develop procedures, methodologies, and supporting tools to enable quality assurance agencies to assess and award the joint European degree label, ensuring integration with existing frameworks and minimising administrative burden.
- Explore the added value of a possible joint European degree, including in disciplines that may face additional regulatory and professional challenges (e.g., engineering) and/or strategic sectors and key technological domains such as AI, quantum, semiconductors, data or cybersecurity and interdisciplinary programmes applying these technologies to sectors like health and biotech;
- Explore whether the European criteria for a joint European degree label could also be applied to higher education programmes at EQF level 5;
- Facilitate peer learning and coordination at national and transnational levels among national/regional authorities, quality assurance agencies, higher education institutions and stakeholder organisations through joint mechanisms and dialogue to support policy alignment and cooperation.

Expected impact

- Increased operational readiness of national systems to award the joint European degree label;
- Increased readiness of quality assurance systems to apply coherent processes and standards for the award of a joint European degree label;
- Growing awareness and interest among higher education institutions in obtaining the joint European degree label;
- More transnational joint programmes are designed and launched that are compliant with the joint European degree label;
- Readiness to contribute to the exploration of the feasibility and added value of a joint European degree, including in specific fields e.g. in engineering.

Leadership Development programme for higher education institutions' leaders

Objectives

The main objective of this action is to develop leadership capabilities enabling transformative change in the higher education sector in Europe. The changing

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geopolitical climate, societal challenges, technological advancement, new ways of teaching and learning, interaction with a wide range of stakeholders, the new level of depth and scope of European higher education cooperation, etc. require diverse leadership skills to navigate through ever-evolving challenges.

This objective will be achieved by setting up a European Leadership Academy. The Academy will foster connectivity, collaboration, pooling of expertise and alignment of leadership approaches. This will be done by setting up and managing an executive leadership development programme for senior leaders at higher education institutions in Europe.

This action will support the higher education sector in the development of deeper transnational cooperation at the European level, promoting new ways of teaching and learning, protecting academic freedom and developing fulfilling academic careers, aligned with the Council Recommendation on attractive and sustainable careers in higher education. This action will also promote female leadership in higher education.

Themes and priorities (scope)

The Academy must address the following themes:

Developing and testing innovative leadership approaches, enabling leaders to guide their institutions through the green and digital transitions, advance innovative learning and teaching and develop sustainable academic careers. The approaches used in the programme should be exploratory, experiential, and action-oriented, ensuring that leaders develop practical capabilities through engagement with authentic institutional challenges.

Shaping European leadership approaches based on European values and encourage academic freedom, sustainability, diversity and transnational cooperation, while ensuring balanced participation across gender, age, institutional profiles, and areas of expertise. By creating opportunities for leaders from a broad range of higher education institutions and sectors, the action will foster a richer exchange of perspectives and enable more innovative and systemic solutions.

Providing visibility by effective communication and dissemination of outputs (learning materials, case studies, training resources, policy briefs, etc.) at institutional, national, and European levels.

Activities that can be funded (scope):

The Academy shall implement a coherent and comprehensive set of activities, such as:

- Training and capacity building by organising workshops, seminars, peerlearning or other types of collaborative events with an aim to reflect on experiences, learn from them and develop innovative approaches;
- Individual and organisational learning through individual reflection, study groups, mentorship arrangements, setting up and managing communities of practices, expert networks and cross-border collaboration;
- o **Institutional visits, job shadowing and/or events with experts** to share experiences, discuss and learn, adding complementary value;
- o Development of various modules and setting up appropriate certification measures, for example by micro-credentials in line with the

European approach to micro-credentials 15;

- Developing suitable digital formats to share learning materials, supportive resources, toolkits or best practices and making them accessible to broader audiences;
- Feedback and analysis to define indicators and data collection methods to assess program outcomes and impact. Conducting participant feedback, institutional case studies, comparative analyses across HEIs and identify the best practices from HEIs to be shared for learning and inspiration;
- o **Developing input for policy brief**s, sharing evidence of good practices and promoting sustainable leadership models through various platforms and networks through the European Higher Education Area.

Expected impact

- Established European Leadership Academy, creating a European community of leadership practice, connecting leaders of higher education institutions in Europe for mutual learning, exchange of practices, and co-creation of innovative solutions to shared challenges.
- o Increased leadership expertise enabling transformative change in the higher education sector in Europe.
- o Facilitating higher education sector transformation in Europe based on transnational cooperation, academic freedom and other European approaches.
- Development of attractive and sustainable academic careers in higher education sector throughout the European Education Area.
- o Inspiration for sustainable leadership models based on European values.

3. Available budget

The estimated available call budget is **EUR 8 000 000**.

Specific budget information per topic can be found in the table below:

Topic	Topic budget
1 — European Degree Pathway Projects	EUR 7 000 000
Leadership Development programme for higher education institutions' leaders	EUR 1 000 000

For topic 1, we expect to fund approximately 8 – 14 projects with an indicative requested EU contribution of EUR 500 000 to EUR 800 000 per project.

For topic 2, we expect to fund 1 project.

We reserve the right not to award all available funds or to redistribute them between the call topics, depending on the proposals received and the results of the evaluation.

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¹⁵ EUR-Lex - 32022H0627(02) - EN - EUR-Lex

4. Timetable and deadlines

Timetable and deadlines (indicative)		
Call opening:	03 December 2025	
Deadline for submission:	03 March 2026 – 17:00:00 CET (Brussels)	
Evaluation:	March-May 2026	
Information on evaluation results:	June-July 2026	
GA signature:	July-October 2026	

5. Admissibility and documents

Proposals must be submitted before the call deadline (see timetable section 4).

Proposals must be submitted **electronically** via the Funding & Tenders Portal Electronic Submission System (accessible via the Topic page in the <u>Calls for proposals</u> section). Paper submissions are NOT possible.

Proposals (including annexes and supporting documents) must be submitted using the forms provided *inside* the Submission System (NOT the documents available on the Topic page — they are only for information).

Proposals must be **complete** and contain all the requested information and all required annexes and supporting documents:

- Application Form Part A contains administrative information about the participants (future coordinator, beneficiaries and affiliated entities) and the summarised budget for the project (to be filled in directly online)
- Application Form Part B contains the technical description of the project (template to be downloaded from the Portal Submission System, completed, assembled and re-uploaded)
- Part C contains additional project data and the project's contribution to EU programme key performance indicators (to be filled in directly online)
- mandatory annexes and supporting documents (templates to be downloaded from the Portal Submission System, completed, assembled and reuploaded):
 - detailed budget table
 - CVs (standard) of core project team
 - activity reports of last year: not applicable
 - list of previous projects (key projects for the last 4 years) (template available in Part B)

Please be aware that since the detailed budget table serves as the basis for fixing the lump sums for the grants (and since lump sums must be reliable proxies for the actual costs of a project), the costs you include MUST comply with the basic eligibility conditions for EU actual cost grants (see <u>AGA — Annotated Grant Agreement, art 6</u>). This is particularly important for purchases and subcontracting, which must comply with

best value for money (or if appropriate the lowest price) and be free of any conflict of interests. If the budget table contains ineligible costs, the grant may be reduced (even later on during the project implementation or after their end).

At proposal submission, you will have to confirm that you have the **mandate to act** for all applicants. Moreover, you will have to confirm that the information in the application is correct and complete and that all participants comply with the conditions for receiving EU funding (especially eligibility, financial and operational capacity, exclusion, etc). Before signing the grant, each beneficiary and affiliated entity will have to confirm this again by signing a declaration of honour (DoH). Proposals without full support will be rejected.

Your application must be **readable**, **accessible and printable** (please check carefully the layout of the documents uploaded).

Proposals are limited to maximum **70 pages** (Part B). Evaluators will not consider any additional pages.

You may be asked at a later stage for further documents (for legal entity validation, financial capacity check, bank account validation, etc).

For more information about the submission process (including IT aspects), consult the Online Manual.

6. Eligibility - for both topics

Eligible participants (eligible countries)

In order to be eligible, the applicants (beneficiaries and affiliated entities) must:

- be legal entities (public or private bodies);
- be established in one of the eligible countries, i.e.:
 - Erasmus+ Programme Countries:
 - EU Member States (including overseas countries and territories (OCTs));
 - non-EU countries:
 - listed EEA countries and countries associated to the Erasmus+ Programme (list of participating countries);
- Any public or private organisation active in the fields of education or training.
 This includes relevant public authorities in charge of higher education and/or national or regional bodies with a mandate from their country related to quality assurance, recognition, funding of higher education institutions or other specific fields (including for example higher education ministries, accreditation and quality assurance agencies, recognition authorities), international associations active in the field of higher education and quality assurance (QA) in higher education (as defined in their statute);
- for higher education institutions (HEIs) established in Erasmus+ Programme Countries (see above): be holders of the ECHE certificate (Erasmus Charter for Higher Education).

Other entities may participate in other consortium roles, such as associated partners, subcontractors, third parties giving in-kind contributions, etc (see section 13). The

geographical range for the associated partners may also extend to third countries not associated to the Programme that are part of the European Higher Education Area¹⁶.

Beneficiaries and affiliated entities must register in the <u>Participant Register</u> — before submitting the proposal — and will have to be validated by the Central Validation Service (REA Validation). For the validation, they will be requested to upload documents showing legal status and origin.

Specific cases and definitions

Natural persons — Natural persons are NOT eligible (with the exception of self-employed persons, i.e. sole traders, where the company does not have legal personality separate from that of the natural person).

International organisations — International organisations are eligible. The rules on eligible countries do not apply to them.

Entities without legal personality — Entities which do not have legal personality under their national law may exceptionally participate, provided that their representatives have the capacity to undertake legal obligations on their behalf, and offer guarantees for the protection of the EU financial interests equivalent to that offered by legal persons¹⁷.

EU bodies — EU bodies (with the exception of the European Commission Joint Research Centre) can NOT be part of the consortium.

Associations and interest groupings — Entities composed of members may participate as 'sole beneficiaries' or 'beneficiaries without legal personality' 18. Please note that if the action will be implemented by the members, they should also participate (either as beneficiaries or as affiliated entities, otherwise their costs will NOT be eligible).

Countries currently negotiating association agreements — Beneficiaries from countries with ongoing negotiations for participation in the programme (see list of participating countries above) may participate in the call and can sign grants if the negotiations are concluded before grant signature and if the association covers the call (i.e. is retroactive and covers both the part of the programme and the year when the call was launched).

EU restrictive measures — Special rules apply for entities subject to <u>EU restrictive</u> <u>measures</u> under Article 29 of the Treaty on the European Union (TEU) and Article 215 of the Treaty on the Functioning of the EU (TFEU)¹⁹. Such entities are not eligible to participate in any capacity, including as beneficiaries, affiliated entities, associated partners, subcontractors or recipients of financial support to third parties (if any).

EU conditionality measures — Special rules apply for entities subject to measures adopted on the basis of EU Regulation 2020/2092²⁰. Such entities are not eligible to participate in any funded role (beneficiaries, affiliated entities, subcontractors, recipients of financial support to third parties, etc.) Currently such measures are in

Albania, Andorra, Armenia, Azerbaijan, Belarus (suspended), Bosnia and Herzegovina, Georgia, Holy See, Kazakhstan, Moldova, Montenegro, Russian Federation (suspended), San Marino, Switzerland, United Kingdom, Ukraine

¹⁷ See Article 200(2)(c) EU Financial Regulation 2024/2509.

¹⁸ For the definitions, see Articles 190(2) and 200(2)(c) EU Financial Regulation 2024/2509.

Please note that the EU Official Journal contains the official list and, in case of conflict, its content prevails over that of the EU Sanctions Map.

Regulation (EU, Euratom) 2020/2092 of the European Parliament and of the Council of 16 December 2020 on a general regime of conditionality for the protection of the Union budget (OJ L 325, 20.12.2022, p. 94).

place for Hungarian public interest trusts established under the Hungarian Act IX of 2021 or any entity they maintain (see <u>Council Implementing Decision (EU) 2022/2506</u>, as of 16 December 2022).

• For more information, see <u>Rules for Legal Entity Validation, LEAR Appointment and Financial Capacity Assessment</u>.

Consortium composition

European Degree Pathway Projects

Proposals must be submitted by a consortium of at least 2 applicants (beneficiaries; not affiliated entities), which complies with the following conditions:

- minimum 2 eligible independent entities from a minimum of 2 different eligible countries (see also above, 'Eligible participants (eligible countries)' or minimum of 2 non-profit international associations active in the field of quality assurance (QA) in higher education (as defined in their statute);
- the same entity (as identified by the PIC) may only participate as full partner in one single application either as coordinator, beneficiary, or affiliated entity. It may participate in other applications only as associated partner. This limitation does not apply to associated partners.

Leadership Development programme for higher education institutions' leaders

Proposals must be submitted by one international association or several organisations from a minimum of 2 different eligible countries coordinated by an international association.

Eligible activities

Applications will only be considered eligible if their content corresponds wholly (or at least in part) to the topic description for which they are submitted.

Eligible activities are the ones set out in section 2 above.

Projects should take into account the results of projects supported by other EU funding programmes. The complementarities must be described in the project proposals (Part B of the Application Form).

Projects must comply with EU policy interests and priorities (such as environment, social, security, industrial and trade policy, etc). Projects must also respect EU values and European Commission policy regarding reputational matters (e.g., activities involving capacity building, policy support, awareness raising, communication, dissemination, etc).²¹

Financial support to third parties is not allowed.

Geographic location (target countries)

Proposals must relate to activities taking place in the eligible countries (see above).

See, for instance, <u>Guidance on funding for activities related to the development, implementation, monitoring and enforcement of Union legislation and policy.</u>

Duration

Topic 1 & 2: Projects should normally last 24 months.

Extensions are possible, if duly justified and through an amendment.

Ethics

Projects must comply with:

- highest ethical standards and
- applicable EU, international and national law.

7. Financial and operational capacity and exclusion

Financial capacity

Applicants must have **stable and sufficient resources** to successfully implement the projects and contribute their share. Organisations participating in several projects must have sufficient capacity to implement all projects.

The financial capacity check will be carried out on the basis of the documents you will be requested to upload in the <u>Participant Register</u> during grant preparation (e.g. profit and loss account and balance sheet, business plan, audit report produced by an approved external auditor, certifying the accounts for the last closed financial year, etc). The analysis will be based on neutral financial indicators, but will also take into account other aspects, such as dependency on EU funding and deficit and revenue in previous years.

The check will normally be done for coordinators, except:

- public bodies (entities established as public body under national law, including local, regional or national authorities) or international organisations;
- public legal entities, and institutions and organisations in the fields of education and training, youth and sport that have received over 50% of their annual revenue from public sources over the last two years;
- if the project requested grant amount is not more than EUR 60 000.

If needed, it may also be done for affiliated entities.

If we consider that your financial capacity is not satisfactory, we may require:

- further information;
- an enhanced financial responsibility regime, i.e. joint and several responsibility for all beneficiaries or joint and several liability of affiliated entities (see below, section 10);
- prefinancing paid in instalments;
- (one or more) prefinancing guarantees (see below, section 10).

or

- propose no prefinancing;
- request that you are replaced or, if needed, reject the entire proposal.

For more information, see <u>Rules for Legal Entity Validation, LEAR Appointment and</u> Financial Capacity Assessment.

Operational capacity

Applicants must have the **know-how**, **qualifications** and **resources** to successfully implement the projects and contribute their share (including sufficient experience in projects of comparable size and nature).

For topic 2 the organisation(s) should be able to demonstrate an in-depth knowledge of European higher education sector, an excellent track record of running similar programmes, an access to an extensive network of higher education institutions and an ability to develop new knowledge through cooperation and innovation.

This capacity will be assessed together with the 'Quality' award criterion, on the basis of the competence and experience of the applicants and their project teams, including operational resources (human, technical and other) or, exceptionally, the measures proposed to obtain it by the time the task implementation starts.

If the evaluation of the award criterion is positive, the applicants are considered to have sufficient operational capacity.

Applicants will have to show their operational capacity via the following information:

- profiles (qualifications and experience) of the staff responsible for implementing the project;
- description of the consortium participants;
- list of previous projects (key projects for the last 4 years) (template available in Part B).

Additional supporting documents may be requested, if needed to confirm the operational capacity of any applicant.

Public bodies, Member State organisations and international organisations are exempted from the operational capacity check.

Exclusion

Applicants which are subject to an **EU exclusion decision** or in one of the following **exclusion situations** that bar them from receiving EU funding can NOT participate²²:

- bankruptcy, winding up, affairs administered by the courts, arrangement with creditors, suspended business activities or other similar procedures (including procedures for persons with unlimited liability for the applicant's debts);
- in breach of social security or tax obligations (including if done by persons with unlimited liability for the applicant's debts);
- guilty of grave professional misconduct²³ (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant);

²² See Articles 138 and 143 of EU Financial Regulation <u>2024/2509</u>.

^{23 &#}x27;Professional misconduct' includes, in particular, the following: violation of ethical standards of the profession; wrongful conduct with impact on professional credibility; breach of generally accepted professional ethical standards; false declarations/misrepresentation of information; participation in a cartel or other agreement distorting competition; violation of IPR; attempting to influence decision-

- committed fraud, corruption, links to a criminal organisation, money laundering, terrorism-related crimes (including terrorism financing), child labour or human trafficking (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant);
- shown significant deficiencies in complying with main obligations under an EU procurement contract, grant agreement, prize, expert contract, or similar (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant);
- guilty of irregularities within the meaning of Article 1(2) of EU Regulation 2988/95 (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant);
- created under a different jurisdiction with the intent to circumvent fiscal, social
 or other legal obligations in the country of origin or created another entity with
 this purpose (including if done by persons having powers of representation,
 decision-making or control, beneficial owners or persons who are essential for
 the award/implementation of the grant);
- intentionally and without proper justification resisted²⁴ an investigation, check or audit carried out by an EU authorising officer (or their representative or auditor), OLAF, the EPPO, or the European Court of Auditors.

Applicants will also be rejected if it turns out that 25:

- during the award procedure they misrepresented information required as a condition for participating or failed to supply that information;
- they were previously involved in the preparation of the call and this entails a distortion of competition that cannot be remedied otherwise (conflict of interest).

8. Evaluation and award procedure

Proposals will have to follow the **standard submission and evaluation procedure** (one-stage submission + one-step evaluation.

An **evaluation committee** (assisted by independent outside experts) will assess all applications. Proposals will first be checked for formal requirements (admissibility, and eligibility, see sections 5 and 6). Proposals found admissible and eligible will be evaluated (for each topic) against the operational capacity and award criteria (see sections 7 and 9) and then ranked according to their scores.

For proposals with the same score (within a topic or budget envelope) a **priority order** will be determined according to the following approach:

making processes by taking advantage, through misrepresentation, of a conflict of interests, or to obtain confidential information from public authorities to gain an advantage; incitement to discrimination, hatred or violence or similar activities contrary to the EU values where negatively affecting or risking to affect the performance of a legal commitment.

²⁴ 'Resisting an investigation, check or audit' means carrying out actions with the goal or effect of preventing, hindering or delaying the conduct of any of the activities needed to perform the investigation, check or audit, such as refusing to grant the necessary access to its premises or any other areas used for business purposes, concealing or refusing to disclose information or providing false information.

²⁵ See Article 143 EU Financial Regulation <u>2024/2509</u>.

Successively for every group of *ex aequo* proposals, starting with the highest scored group, and continuing in descending order:

- 1) Projects focusing on a theme that is not otherwise covered by higher ranked projects will be considered to have the highest priority.
- 2) The ex aequo proposals within the same topic will be prioritised according to the scores they have been awarded for the award criterion 'Relevance'. When these scores are equal, priority will be based on their scores for the criterion 'Quality. When these scores are equal, priority will be based on their scores for the criterion 'Impact'.
- 3) If this does not allow to determine the priority, a further prioritisation can be done by considering the overall project portfolio and the creation of positive synergies between projects, or other factors related to the objectives of the call. These factors will be documented in the panel report.
- 4) After that, the remainder of the available call budget will be used to fund projects across the different topics in order to ensure a balanced spread of the geographical and thematic coverage and while respecting to the maximum possible extent the order of merit based on the evaluation of the award criteria.

All proposals will be informed about the evaluation result (**evaluation result letter**). Successful proposals will be invited for grant preparation; the other ones will be put on the reserve list or rejected.

⚠ No commitment for funding — Invitation to grant preparation does NOT constitute a formal commitment for funding. We will still need to make various legal checks before grant award: legal entity validation, financial capacity, exclusion check, etc.

Grant preparation will involve a dialogue in order to fine-tune technical or financial aspects of the project and may require extra information from your side. It may also include adjustments to the proposal to address recommendations of the evaluation committee or other concerns. Full compliance will be a pre-condition for signing the grant.

If you believe that the evaluation procedure was flawed, you can submit a **complaint** (following the deadlines and procedures set out in the evaluation result letter). Please note that notifications which have not been opened within 10 days after sending will be considered to have been accessed and that deadlines will be counted from opening/access (see also <u>Funding & Tenders Portal Terms and Conditions</u>). Please also be aware that for complaints submitted electronically, there may be character limitations.

9. Award criteria

The **award criteria** for this call are as follows:

1. Relevance (30 points)

Extent to which the proposal:

- o addresses the themes, priorities and objectives of the call;
- o demonstrates a strong rationale for adapting and designing innovative joint programmes, addressing identified gaps or emerging needs;
- o presents a sound needs analysis that justifies the chosen approach, defining measurable and realistic targets (KPIs) directly linked to identified needs;
- o specifies the scale and depth of planned activities;

- applies state-of-the-art methods and techniques, leading to concrete results and solutions in general or in the project's geographical context (e.g., content, outputs, working methods, types of organisations involved);
- brings EU added value by fostering deeper transnational cooperation, producing results unattainable at country or institution level alone, involving partners from different countries, and delivering replicable models aligned with the EU's strategic and legislative context;
- o supports the respect and promotion of shared EU values, including human dignity, freedom, democracy, equality, rule of law, human rights, and non-discrimination.

2. Quality:

2.1 Project design and implementation (20 points):

Extent to which the proposal:

- o is technically sound, ensuring coherence between objectives, activities, timeline and expected results;
- o demonstrates the quality and feasibility of the methodology proposed and its appropriateness for producing the expected results;
- o the work programme is clear, complete, and feasible (including work packages, task/resource allocation, deliverables, milestones);
- o demonstrates solid management arrangements. Timelines, organisation, coordination, supervision and other responsibilities are well defined and realistic;
- o allocates appropriate resources to each activity and demonstrates the adequacy and effectiveness of the budget and financial planning to ensure best value for money;
- ensures appropriate financial management arrangements, aligning tasks, roles and resources among partners;
- o sets out specific monitoring and quality assurance measures, including KPIs with a relevant timeline;
- o identifies potential risks across the project life cycle and proposes mitigation strategies.

2.2 Partnership and cooperation arrangements (20 points):

Extent to which the proposal:

- o reflects the applicant's or consortium's strengths, with complementary skills, expertise and experience aligned to the project's objectives;
- o clearly describes the role, commitment and responsibilities of the organisation/team, in line with their capacity and expertise;
- o establishes effective procedures for communication, decision-making and problem-solving within the consortium.

3. Impact (30 points):

Extent to which the proposal:

- o includes an appropriate communication strategy to raise awareness of the project;
- o adequately describes the benefits for target groups and how these will be tracked and evaluated,
- o defines a sound dissemination and exploitation approach to facilitate uptake of results by target groups;
- o ensures transferability across the European Higher Education Area (EHEA), highlighting models, practices and evidence that can be adopted more widely;
- o provides measures and resources to sustain results and benefits beyond the project's lifetime.
- 1. Relevance: (30 points)

2. Quality:

- Project design and implementation: (20 points)
- Partnership and cooperation arrangements: (20 points)

3. Impact: (30 points).

Award criteria (both topics)	Minimum pass score	Maximum score
Relevance	16	30
Quality — Project design and implementation	11	20
Quality — Partnership and cooperation arrangements	11	20
Impact	16	30
Overall (pass) scores	60	100

Maximum points: 100 points.

Individual thresholds per criterion: 16/30, 11/20, 11/20 and 16/30 points.

Overall threshold: 60 points.

Proposals that pass the individual thresholds AND the overall threshold will be considered for funding — within the limits of the available budget (i.e. up to the budget ceiling). Other proposals will be rejected.

10. Legal and financial set-up of the Grant Agreements

If you pass evaluation, your project will be invited for grant preparation, where you will be asked to prepare the Grant Agreement together with the EU Project Officer.

This Grant Agreement will set the framework for your grant and its terms and conditions, in particular concerning deliverables, reporting and payments.

The Model Grant Agreement that will be used (and all other relevant templates and guidance documents) can be found on Portal Reference Documents.

Starting date and project duration

The project starting date and duration will be fixed in the Grant Agreement (*Data Sheet, point 1*). Normally the starting date will be after grant signature. A retroactive starting date can be granted exceptionally for duly justified reasons — but never earlier than the proposal submission date.

Project duration: see section 6 above.

Milestones and deliverables

The milestones and deliverables for each project will be managed through the Portal Grant Management System and will be reflected in Annex 1 of the Grant Agreement.

Form of grant, funding rate and maximum grant amount

The grant parameters (maximum grant amount, funding rate, total eligible costs, etc) will be fixed in the Grant Agreement (Data Sheet, point 3 and art 5).

Project budget (requested grant amount):

- o Topic 1: between EUR 500 000 and EUR 800 000 per project;
- Topic 2: Up to EUR 1 000 000 per project.

The grant awarded may be lower than the amount requested.

The grant will be a lump sum grant. This means that it will reimburse a fixed amount, based on a lump sum or financing not linked to costs. The amount will be fixed by the granting authority on the basis of the estimated project budget and a funding rate of **85%**.

Budget categories and cost eligibility rules

The budget categories and cost eligibility rules are fixed in the Grant Agreement (Data Sheet, point 3, art 6 and Annex 2).

Budget categories for this call:

Lump sum contributions ²⁶

Specific cost eligibility rules for this call:

- the lump sum amount must be calculated in accordance with the methodology set out in the lump sum decision and using the detailed budget table;
- the lump sum calculation should respect the following conditions:
 - the estimated budget must comply with the basic eligibility conditions for EU actual cost grants (see <u>AGA — Annotated Grant Agreement, art 6</u>)
 - costs for financial support to third parties: not allowed

Decision of 24 March 2021 authorising the use of lump sum contributions and unit contributions under the Erasmus+ Programme 2021-2027.

Reporting and payment arrangements

The reporting and payment arrangements are fixed in the Grant Agreement (Data Sheet, point 4 and art 21 and 22).

After grant signature, you will normally receive a **prefinancing** to start working on the project (float of normally **70%** of the maximum grant amount; exceptionally less or no prefinancing). The prefinancing will be paid 30 days from entry into force/financial guarantee (if required) — whichever is the latest.

In Month 13, you are required to submit a **progress report** as part of your deliverables. This report will not be connected to any payment obligations.

Payment of the balance: At the end of the project, we will calculate your final grant amount. If the total of earlier payments is higher than the final grant amount, we will ask you (your coordinator) to pay back the difference (recovery).

All payments will be made to the coordinator.

Please be aware that payments will be automatically lowered if you or one of your consortium members has outstanding debts towards the EU (granting authority or other EU bodies). Such debts will be offset by us — in line with the conditions set out in the Grant Agreement (see art 22).

Please also note that you are responsible for **keeping records** on all the work done.

Prefinancing quarantees

If a prefinancing guarantee is required, it will be fixed in the Grant Agreement (*Data Sheet, point 4*). The amount will be set during grant preparation and it will normally be equal or lower than the prefinancing for your grant.

The guarantee should be in euro and issued by an approved bank/financial institution established in an EU Member State. If you are established in a non-EU country and would like to provide a guarantee from a bank/financial institution in your country, please contact us (this may be exceptionally accepted, if it offers equivalent security).

Amounts blocked in bank accounts will NOT be accepted as financial guarantees.

Prefinancing guarantees are normally requested from the coordinator, for the consortium. They must be provided during grant preparation, in time to make the prefinancing (scanned copy via Portal AND original by post).

If agreed with us, the bank guarantee may be replaced by a guarantee from a third party.

The guarantee will be released at the end of the grant, in accordance with the conditions laid down in the Grant Agreement (art 23).

<u>Certificates</u>

Depending on the type of action, size of grant amount and type of beneficiaries, you may be requested to submit different certificates. The types, schedules and thresholds for each certificate are fixed in the Grant Agreement (Data Sheet, point 4 and art 24).

Liability regime for recoveries

The liability regime for recoveries will be fixed in the Grant Agreement (Data Sheet,

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point 4.4 and art 22).

For beneficiaries, it is one of the following:

- limited joint and several liability with individual ceilings each beneficiary up to their maximum grant amount
- unconditional joint and several liability each beneficiary up to the maximum grant amount for the action

or

individual financial responsibility — each beneficiary only for their own debts.

In addition, the granting authority may require joint and several liability of affiliated entities (with their beneficiary).

Provisions concerning the project implementation

IPR rules: see Model Grant Agreement (art 16 and Annex 5):

- rights of use on results: Yes
- access to results for policy purposes: Yes
- access rights to ensure continuity and interoperability obligations: Yes

Communication, dissemination and visibility of funding: see Model Grant Agreement (art 17 and Annex 5):

additional communication and dissemination activities: Yes

Specific rules for carrying out the action: see Model Grant Agreement (art 18 and Annex 5):

- EU restrictive measures: Yes

Other specificities

Consortium agreement: Yes

Non-compliance and breach of contract

The Grant Agreement (chapter 5) provides for the measures we may take in case of breach of contract (and other non-compliance issues).

For more information, see <u>AGA — Annotated Grant Agreement</u>.

11. How to submit an application

All proposals must be submitted directly online via the Funding & Tenders Portal Electronic Submission System. Paper applications are NOT accepted.

Submission is a 2-step process:

a) create a user account and register your organisation

To use the Submission System (the only way to apply), all participants need to <u>create</u> an EU Login user account.

Once you have an EULogin account, you can <u>register your organisation</u> in the Participant Register. When your registration is finalised, you will receive a 9-digit participant identification code (PIC).

b) submit the proposal

Access the Electronic Submission System via the Topic page in the <u>Calls for proposals</u> section (or, for calls sent by invitation to submit a proposal, through the link provided in the invitation letter).

Submit your proposal in 4 parts, as follows:

- Part A includes administrative information about the applicant organisations (future coordinator, beneficiaries, affiliated entities and associated partners) and the summarised budget for the proposal. Fill it in directly online
- Part B (description of the action) covers the technical content of the proposal.
 Download the mandatory word template from the Submission System, fill it in and upload it as a PDF file
- Part C containing additional project data. To be filled in directly online.
- Annexes (see section 5). Upload them as PDF file (single or multiple depending on the slots). Excel upload is sometimes possible, depending on the file type.

The proposal must keep to the **page limits** (see section 5); excess pages will be disregarded.

Documents must be uploaded to the **right category** in the Submission System, otherwise the proposal may be considered incomplete and thus inadmissible.

The proposal must be submitted **before the call deadline** (see section 4). After this deadline, the system is closed and proposals can no longer be submitted.

Once the proposal is submitted, you will receive a **confirmation e-mail** (with date and time of your application). If you do not receive this confirmation e-mail, it means your proposal has NOT been submitted. If you believe this is due to a fault in the Submission System, you should immediately file a complaint via the <u>IT Helpdesk webform</u>, explaining the circumstances and attaching a copy of the proposal (and, if possible, screenshots to show what happened).

Details on processes and procedures are described in the <u>Online Manual</u>. The Online Manual also contains the links to FAQs and detailed instructions regarding the Portal Electronic Exchange System.

Guidance on the use of generative AI tools for the preparation of the proposal

When considering the use of generative artificial intelligence (AI) tools for the preparation of the proposal, it is imperative to exercise caution and careful consideration. The AI-generated content should be thoroughly reviewed and validated by the applicants to ensure its appropriateness and accuracy, as well as its compliance with intellectual property regulations. Applicants are fully responsible for the content of the proposal (even those parts produced by the AI tool) and must be transparent in disclosing which AI tools were used and how they were utilised.

Specifically, applicants are required to:

- Verify the accuracy, validity, and appropriateness of the content and any citations generated by the AI tool and correct any errors or inconsistencies.
- Provide a list of sources used to generate content and citations, including those generated by the AI tool and double-check citations to ensure they are accurate and properly referenced;
- Be conscious of the potential for plagiarism where the AI tool may have reproduced substantial text from other sources and check the original sources to be sure you are not plagiarising someone else's work;
- Acknowledge the limitations of the AI tool in the proposal preparation, including the potential for bias, errors, and gaps in knowledge.

12. Help

As far as possible, *please try to find the answers you need yourself*, in this and the other documentation (we have limited resources for handling direct enquiries):

- Online Manual
- Topic Q&A on the Topic page
- Portal FAQ (for general questions).

Please also consult the Topic page regularly, since we will use it to publish call updates. (For invitations, we will contact you directly in case of a call update).

Contact

For individual questions on the Portal Submission System, please contact the <u>IT</u> Helpdesk.

Non-IT related questions should be sent to the following email address:

EACEA-PI-FORWARD-HE@ec.europa.eu.

Please indicate clearly the reference of the call and topic to which your question relates (see cover page).

13. Important



IMPORTANT

- Don't wait until the end Complete your application sufficiently in advance of the deadline to avoid any last minute technical problems. Problems due to last minute submissions (e.g. congestion, etc.) will be entirely at your risk. Call deadlines can NOT be extended.
- Consult the Portal Topic page regularly. We will use it to publish updates and additional information on the call (call and topic updates).
- Funding & Tenders Portal Electronic Exchange System By submitting the application, all participants accept to use the electronic exchange system in accordance with the Portal Terms & Conditions.
- Registration Before submitting the application, all beneficiaries, affiliated entities and associated partners must be registered in the Participant Register. The participant identification code (PIC) (one per participant) is mandatory for the Application Form.
- Consortium roles When setting up your consortium, you should think of organisations that help you reach objectives and solve problems.

The roles should be attributed according to the level of participation in the project. Main participants should participate as beneficiaries or affiliated entities; other entities can participate as associated partners, subcontractors, third parties giving inkind contributions. Associated partners and third parties giving in-kind contributions should bear their own costs (they will not become formal recipients of EU funding). Subcontracting should normally constitute a limited part and must be performed by third parties (not by one of the beneficiaries/affiliated entities). Subcontracting going beyond 30% of the total eligible costs must be justified in the application.

- Coordinator In multi-beneficiary grants, the beneficiaries participate as consortium (group of beneficiaries). They will have to choose a coordinator, who will take care of the project management and coordination and will represent the consortium towards the granting authority. In mono-beneficiary grants, the single beneficiary will automatically be coordinator.
- Affiliated entities Applicants may participate with affiliated entities (i.e. entities linked to a beneficiary which participate in the action with similar rights and obligations as the beneficiaries, but do not sign the grant and therefore do not become beneficiaries themselves). They will get a part of the grant money and must therefore comply with all the call conditions and be validated (just like beneficiaries); but they do not count towards the minimum eligibility criteria for consortium composition (if any). If affiliated entities participate in your project, please do not forget to provide documents demonstrating their affiliation link to your organisation as part of your application.
- Associated partners Applicants may participate with associated partners (i.e. partner organisations which participate in the action but without the right to get grant money). They participate without funding and therefore do not need to be validated.
- Consortium agreement For practical and legal reasons it is recommended to set up internal arrangements that allow you to deal with exceptional or unforeseen circumstances (in all cases, even if not mandatory under the Grant Agreement). The consortium agreement also gives you the possibility to redistribute the grant money according to your own consortium-internal principles and parameters (for instance, one beneficiary can reattribute its grant money to another beneficiary). The consortium agreement thus allows you to customise the EU grant to the needs inside your consortium and can also help to protect you in case of disputes.

- Balanced project budget Grant applications must ensure a balanced project budget and sufficient other resources to implement the project successfully (e.g. own contributions, income generated by the action, financial contributions from third parties, etc). You may be requested to lower your estimated costs, if they are ineligible (including excessive).
- Completed/ongoing projects Proposals for projects that have already been completed will be rejected; proposals for projects that have already started will be assessed on a case-by-case basis (in this case, no costs can be reimbursed for activities that took place before the project starting date/proposal submission).
- **No-profit rule** Grants may NOT give a profit (i.e. surplus of revenues + EU grant over costs). This will be checked by us at the end of the project.
- No cumulation of funding/no double funding It is strictly prohibited to cumulate funding from the EU budget (except under 'EU Synergies actions'). Outside such Synergies actions, any given action may receive only ONE grant from the EU budget and cost items may under NO circumstances be declared under two EU grants; projects must be designed as different actions, clearly delineated and separated for each grant (without overlaps).
- Combination with EU operating grants Combination with EU operating grants is possible, if the project remains outside the operating grant work programme and you make sure that cost items are clearly separated in your accounting and NOT declared twice (see AGA Annotated Grant Agreement, art 6.2.E).
- **Resubmission** Proposals may be changed and re-submitted until the deadline for submission.
- **Rejection** By submitting the application, all applicants accept the call conditions set out in this this Call document (and the documents it refers to). Proposals that do not comply with all the call conditions will be rejected. This applies also to applicants: All applicants need to fulfil the criteria; if any one of them doesn't, they must be replaced or the entire proposal will be rejected.
- Cancellation There may be circumstances which may require the cancellation of the call. In this case, you will be informed via a call or topic update. Please note that cancellations are without entitlement to compensation.
- Language You can submit your proposal in any official EU language (project abstract/summary should however always be in English). For reasons of efficiency, we strongly advise you to use English for the entire application. If you need the call documentation in another official EU language, please submit a request within 10 days after call publication (for the contact information, see section 12).
- **Transparency** In accordance with Article 38 of the <u>EU Financial Regulation</u>, information about EU grants awarded is published each year on the <u>Europa website</u>.

This includes:

- beneficiary names
- beneficiary addresses
- the purpose for which the grant was awarded
- the maximum amount awarded.

The publication can exceptionally be waived (on reasoned and duly substantiated request), if there is a risk that the disclosure could jeopardise your rights and freedoms under the EU Charter of Fundamental Rights or harm your commercial interests.

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• Data protection — The submission of a proposal under this call involves the collection, use and processing of personal data. This data will be processed in accordance with Regulation 2018/1725. It will be processed solely for the purpose of evaluating your proposal, subsequent management of your grant and, if needed, programme monitoring, evaluation and communication. Details are explained in the Funding & Tenders Portal Privacy Statement.