

Navigating Lump Sum Funding in Erasmus+

A non-exhaustive and evolving list of resources – November 2024

A lot of information related to the Lump Sum funding model is published in the context of its use in Horizon Europe funded projects. Whereas the general principles of Lump Sum funding are equally applicable across EU funding programmes, important nuances in the framework of the Erasmus+ programme exist as well.

Nevertheless, some of the general information, or materials developed in the context of Horizon Europe, can also contribute to understanding the ins and outs of this funding model. This non-exhaustive list therefore aims to offer a starting point to provide insights into the Lump Sum funding model, which can be leveraged when designing and managing an Erasmus+ Lump Sum funded project. Keep in mind that nuances must be made between action types that are under direct management (EACEA) or indirect management (National Agencies), following the information and instructions that are available for each.

General resources

- [Model Grant Agreement](#)
 - o Including Annexes for actions under indirect management
- [Annotated Model Grant Agreement](#)
- [How to manage your Lump Sum grants](#)
- [EU Audits – Indicative Audit Programme \(IAP\) – EU Funding Programmes 2021-2027](#)

Erasmus+ specific resources

- [Erasmus+ Programme Guide](#)
- [Handbook on the Lump Sum funding model](#) – Key Action 2 Partnerships for Cooperation
 - o Or as made available by your National Agency
- Romanian Erasmus+ National Agency, [Guidelines](#) for Impact, Quality and Reporting in the New Erasmus+ KA220 Projects
- [Commission Decision](#) authorising the use of lump sums and unit costs under the Erasmus+ Programme 2021-2027
- [Commission Decision C\(2024\)5405](#) on the use of unit costs for travel, accommodation and subsistence costs
- [Commission Distance Calculator](#)
- The Frequently Asked Questions sections under the respective Erasmus+ Call pages may provide additional information on how to interpret the rules related to Lump Sum funding. For centralised actions, these FAQs can be accessed through the [EU Funding & Tenders Portal](#), by navigating to the call pages and their FAQ sections. For decentralised actions, the dedicated webpages of the National Agencies may contain additional information as well.

Horizon Europe specific resources

- [Dedicated Page](#) on Lump Sum Funding in Horizon Europe on the EU Funding & Tenders Portal, further containing links to documents, presentations, and videos, including:
 - [Page](#) with guidance on Lump Sum Funding, with notable resources (but not limited to):
 - [Lump Sums – What do I need to know](#)
 - [Lump Sum Grants in Horizon Europe](#) – why do we need them and how do they work in practice?
 - [Horizon Europe Proposal Evaluation](#) – Standard briefing: expert briefing on the principles to be taken into consideration when evaluating a Horizon Europe proposal. Also contains a section on evaluating a Lump Sum proposal.
 - [Horizon Europe Dashboard on Lump Sum Evaluations](#): not mandatory to be used for Erasmus+ projects, but may contribute to assessing applicable staff rates
 - [Best Practices](#) for Lump Sum grants
 - [Frequently Asked Questions](#). This FAQ is not limited to, but heavily focuses on Horizon Europe.
 - [Regular webinars](#) on Lump Sum funding in Horizon Europe

Reports

- [Commission Assessment](#) of the Lump Sum pilot 2018-2020, October 2021
- European Parliament Panel for the Future of Science and Technology (STOA) commissioned [Study](#) on “A reimbursement system based on a fixed lump sum - Is it the right tool for the EU Framework Programme for research?”, May 2022
- [Commission Assessment](#) of Lump Sum Funding in Horizon 2020 and Horizon Europe, July 2024
 - [Summary](#) of the Assessment