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# Keeping it simple: Phase 2 lump sum

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# Content



1. What is the lump sum?
2. The why and how
3. What you need to deliver
4. What it means for phase 1 closure



# 1. What is the lump sum?

- Phase 1: refund of real expenses (eligible costs incurred and paid out)

Activities implemented → costs incurred → refund of costs



# 1. What is the lump sum?



- Phase 2: payment of a single and fixed amount for the delivery of known outputs

Activities implemented → all outputs achieved → lump sum paid





# 1. What is the lump sum?

- EUR 17,000 per policy instrument addressed (not per partner)
- Covers all costs (staff, office and admin, T&A and EE&S) necessary to carry out the predefined phase 2 activities
- Payment upon the completion of several outputs with minimum requirements



## 2. The why and how

- YES** Remove obligation of real costs reporting  
→ Reduced risk of audit errors
- YES** Optimize time available during phase 2  
(one year only)  
→ More time for activities
- YES** Reduce administrative burden

## 2. The why and how



- Amount based on data from all 1st and 2nd call projects
- Allocated to the LP's budget and paid with approval of last PR
- Shared among the partners on the basis of the project partnership agreement

## 2. The why and how



- Allocation to LP for entire project



- ✓ Partners share internally
- ✓ In respect of different cost levels + roles in project (LP, final conference organizer, AP, 2 partners from same region, etc.)





# 3. What you need to achieve/ deliver



# 3. What you need to achieve/ deliver



- Final dissemination event
  - ✓ 3-6 policy instruments – min 40 participants
  - ✓ 7+ policy instruments – min 50 participants
  
- Supporting documents:
  - ✓ agenda
  - ✓ signed participants list



## 3. What you need to achieve/ deliver

- Partner meeting
  - ✓ 90% partnership represented
  
- Supporting documents:
  - ✓ agenda
  - ✓ meeting notes
  - ✓ signed participants list



### 3. What you need to achieve/ deliver

**Achievement  
of ALL outputs**

**=**

**Payment of  
lump sum**



**ALL or  
nothing!**





### 3. What you need to achieve/ deliver

- No supporting documents needed to prove that costs have been incurred
- FLC performed by the JS
- Supporting documents proving the delivery of phase 2 outputs to be sent to the JS

▶ *Check out **section 7.4** programme manual*

## 4. What does it mean for Phase 1 closure?



- Make sure all costs related to phase 1 are included in the last PR of phase 1 (paid out)
  - Do not schedule content-related activities in the last 3 months of phase 1
- No delayed payments possible in phase 2
- No extension of phase 1

# Time for questions

