FINANCIAL GUIDELINES
SI-JOINT Call 2020

Brussels, 12 March 2019
Budget lines

A. Investment costs
B. Operational costs
C. Personnel costs
D. Scholarship costs
E. Coordination costs
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A. Investment costs

- Indicative max 25% of the total budget in the case of SI & JOINT
- Durable goods with long use
- Should be registered and handed over to the partner university at the end of the project

• A.1. Infrastructure
  - No major investments (e.g. buildings, canals, roads, etc.)
  - Minor infrastructure facilities (e.g. air-conditioning or small infrastructure for a laboratory facility)

• A.2. Equipment

• A.3. Vehicles
  - No vehicles in South Initiatives and JOINT

• A.4. Office furniture

• A.5. Other
B. Operational costs

- Project related costs, directly linked to activities leading to a previously defined IR (intermediate result)
- ↔ coordination costs for general management of the project

E.g.:  
- costs related to the organisation of a workshop,  
- consumer goods,  
- field trip transport,  
- software licenses,  
- travel costs ....
B. Operational costs: detailed lines

• B.1. Shipment costs
  • Shipment of investment and consumer goods to partner country
  • Packing, transport and insurance costs
  • Local costs such as stocking, customs clearing, handling, local transport, ….
  • NOT: import taxes!
    To be charged to the partner who needs to undertake steps with relevant authorities to waive these taxes

• B.2. Maintenance of equipment
  • An amount to anticipate necessary maintenance
B. Operational costs: detailed lines

- **B.3. Consumer goods**
  - Consumables necessary for the achievement of project results
  - E.g. small lab material, chemicals, books, replacement pieces, office supplies, fuel, ….

- **B.4. Communication**
  - Telephone, internet, invitations, brochures,…
  - Always based on invoices, no lump sums

- **B.5. Representation**
  - Max. 500 EUR per year
  - Diners, receptions, small gifts, ….
  - No alcohol, tobacco or derived products
B. Operational costs: detailed lines

• B.6. Travel costs in Belgium and partner country
  ➢ Always based on invoices, no lump sums
  ➢ Careful: when using local transport during a (international) visit within the city of stay, the per diem is supposed to cover the costs

✓ In Belgium
  • Public transport (train, bus, tram, metro)
  • Car: fixed kilometer allowance
  • Taxi: only with justification, in exceptional cases

✓ In partner country
  • Car: fixed kilometer allowance
    – not higher than Belgian kilometer allowance
    – the allowance covers costs for fuel, driver, insurance, etc.
  • If necessary rental car
  • Train, boat, bus, metro or other means of transport
    – Reimbursement of the ticket
  • Plane: local economy flight
B. Operational costs: detailed lines

• B.7. Congress registrations
  • When there is an active participation (poster, paper)

• B.8. Local per diem
  • = Lump sum compensation to cover travel related expenses (transport, meals, communication, etc.)
  • ≠ Salary or service contract
  • Only when travelling to another city
  • VLIR-UOS national per diem amount, if available
  • If not: amount in accordance with national legislation (partner country) and local institutional scales (partner institution) up to max. 25 EUR/day
  • Costs of hotel covered separately based on invoices
B. Operational costs: detailed lines

• B.9. International travel costs
  • Travel costs for international visitors, NOT for scholarships
  • Based on invoices
  • Plane ticket: economy class, airport taxes, booking fees
  • Other costs:
    – transport to and from the airport
    – visa (careful! visa for Belgium is free!)
    – passport
    – passport pictures
    – costs for certificates
    – travel and cancellation insurances
    – compulsory vaccinations and anti-malaria drugs
B. Operational costs: detailed lines

• B.10. International overnight expenses
  • Residential costs for visitors, NOT for scholarships
  • Visit can take a max. of 21 days
  • International per diem
    – = lump sum allowance calculated on the nights spent in the country
    – List of per diem amounts per country (changes frequently!)
    – Per diem includes local transport (within city of stay), food, drinks, personal expenses, communication,…
  • Hotel costs
    – Based on invoice
    – “indicative maximums” per country
    – NOT for: meals, room service, internet, telephone, etc.

• B.11. Others
C. Personnel costs

• C.1. Service contracts
• C.2. Topping-up
• C.3. Employment contracts

➢ To be kept to a minimum
➢ Indicative max. 25% of total project budget (with allowed variation over the years)
➢ Should not replace academic payroll costs
➢ Focus on specific project support and needs
➢ No personnel costs in the North
➢ Guest lecturers and visitings: no fee except reimbursement of travel and accommodation costs (incl. per diem) – no teaching allowances
C. Personnel costs: detailed lines

- C.1. Service contracts
  - External forces for a very specific task
  - Local scales
  - Drawing a contract

- C.2. Topping-up
  - Supplement to the salary of university staff involved in the project
  - Max. 40% of gross salary
  - Justification: salary slip
  - To be kept to a minimum → standard academic responsibilities

- C.3. Employment contracts
  - (Temporary) university personnel paid by the project
  - Academic (researchers, etc.), administrative (secretary, etc.), technical (driver, etc.)
  - University salary scales
D. Scholarship costs

- Only scholarships contributing to capacity building at local partner institution
- Only for:
  - Members of staff
  - Students with commitment from local institution to employ them after graduation

- Detailed guidelines (incl. amounts) on VLIR-UOS website, updated regularly
D. Scholarship costs

• In Belgium:
  • Short term allowance (study/research stay – max. 6 months)
  • Master scholarship (study scholarship – max. 2 years)
  • PhD scholarship
    – only for TEAM
    – SI-JOINT: exceptionally finalization of a PhD
    – Sandwich formula (1/3 Belgium, 2/3 partner country); deviations must be requested to and approved by VLIR-UOS, in any case max. 24 months Belgium and max. 4 academic years
D. Scholarship costs

• In partner country:
  • Master scholarship
  • PhD scholarship

• Must comprise following aspects:
  • Allowance
    – Based on local scales or, if not available, on realistic estimate of cost of living
    – Maximum the allowance of Belgian scholarship
  • Enrolment fee
    – In case the local scholarship is at the partner institution these costs are expected to be waived by the partner institution
  • Training costs
    – Accepted if no enrolment fee is payable
  • Insurance
E. Coordination costs

- Costs related to the administration and coordination of the project (e.g. costs of sending documents, phone costs, costs of copying reports etc.)

- E.1. Coordination costs in Belgium
  - Lump sum: 5% of the A-D total

- E.2. Coordination costs in partner country
  - Lump sum: 5% of the A-D total

- Save part of it as a reserve in case expenses are refused by VLIR-UOS!
Budget changes

• **Budget shift**: shift in the budget within a project year, from one budget line to another
  • E.g. from A. Investments to B. Operationals
  • Budget shift request:
    – **WHEN?**
      » The shift in the total budget line for personnel costs or investment costs is higher than 10,000 EUR as compared to the initial budget line total
      AND
      » The shift amounts to more than 30% as compared to the initial budget line total (for the whole of the project) foreseen for personnel or investment costs

    – **HOW?** Revised budget plan to be included in the Annual Progress Report or - in case of the last activity year: before 30 June of that year
Budget changes

- **Budget transfer**: transfer of (a part of) the budget from one project year to the next
  - No transfer request has to be submitted to VLIR-UOS if unspent budget is transferred to same budget lines in next activity year
Information on website


1. International hotel and per diem allowances

2. Kilometer allowance

3. Scholarship guidelines

4. Financial guidelines
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