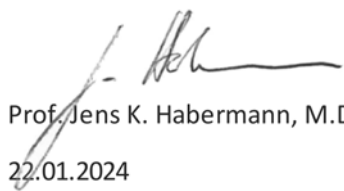


# Internal Travel Policy

*BBMRI-ERIC*

## Document information

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<b>Document owner</b>	Thomas Steger (Finance & Project Management)
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## 1. PREAMBLE

BBMRI-ERIC commits to respect the importance of ecological and economic considerations as general principles. These principles will drive operative decisions and decisions related to travel activities. These decisions impact not only the means of travel but also result in general reductions in travel to a minimum level, which helps to minimise BBMRI-ERIC's carbon footprint and energy consumption. In line, all travels outside the EU and EU associated countries will require approval by the Director General.

## 2. SCOPE

This document describes the policy for and the process of business travel to be conducted by BBMRI-ERIC Headquarters (HQ) employees or seconded employees on behalf of HQ.

## 3. PROCESS DESCRIPTION AND RESPONSIBILITIES

Process owner: Finance & Project Management (F & PM)

### 3.1 Description of business travel management

#### *3.1.1 Before the travel*

a) Business Travel

- The respective Head of Department (HoD) must approve any business travel. If the HoD is not available, the Head of Finance (HoF) will approve the travel.
- After the HoD (or HoF) approves the travel, the traveller forwards the travel plan to the Central Office (CO) per e-travel form or [Online travel request form](#) (TRF). CO will then contact the travel agency to obtain an offer for the means of transportation.

This traveller must provide the following information on the form:

- Name and scope of the meeting
- Date and location of the meeting
- Project cost centre to be charged (and work package number, if applicable)
- Invitation letter (or similar item), agenda (if available)
- Preferred time period and main means of travel (check: budgeted travelling costs within projects)
- Any additional information (e.g. if a multi-stop/open-jaw flight" should be booked)
- The CO continues with the travel booking (and sends a link for registration with the travel agency to the traveller). The CO saves any relevant documents in the assigned personal travel folder on the [SharePoint](#) (i.e. the confirmation for the means of travel and booking confirmation for the hotel). Once the booking arrangements are complete, CO issues a Travel Expense Claim number (TEC number) and creates a new

TEC form designated for the travel. CO then forwards the relevant document link to the traveller. All the documents must be saved in the folder designated for travel on the SharePoint.

Please note:

All documents are filed in the following “Travel Expenses” folder on the SharePoint:

<https://bbmrieric.sharepoint.com/sites/home/Travel%20Expenses/Forms/AllItems.aspx>

Once the CO has completed the booking, they will inform the traveller of this completion via e-mail.

- If a single trip will be carried out for more than one purpose (e.g. for two European Union (EU) projects or one EU Project and one core activity), the costs must be reported by using **separate TECs!** The costs of such combined travel can be charged to the respective project, but **ONLY** up to the cost that would have been incurred if the travel had been made exclusively for this project AND if:
  - it is the usual practice of the beneficiary to pay for such travels (e.g. travels combining professional and personal reasons)
  - the costs incurred are actual costs for the beneficiary.

Example:

The researcher flies from Graz, where the beneficiary is based, to Brussels for a project meeting. After the meeting, instead of flying back to Graz, the researcher flies directly to Paris to participate in another event that is not related to the initial cost centre activity. The beneficiary may charge the following costs incurred at the second event to the cost centre:

- the cost of the flight from Graz to Brussels, and
- the part of the flight back from Paris to Graz up to the cost that the traveller would have incurred for a flight from Brussels back to Graz after the first project meeting ended. (The traveller should provide evidence of these costs on the TEC form).

b) A1 Form:

- Based on EU regulation (EC) 883/2004, employers are responsible for applying for a confirmation of the applicable social security law (A1 form) for each of their employees who travel to other EU countries (and Switzerland). BBMRI-ERIC has formed an agreement with the employees who travel frequently to apply for an A1 form (valid for 2 years) based on travel they are planning over the next 2 years (based on, e.g. project involvements, workshops, meetings). The Human Resources Specialist (HRS) will contact each respective employee regarding their travel destinations, prepare the A1 form, and upload the digital version of the document to [BambooHR](#): Documents → A1 forms for each employee.
- Before the travel takes place, the travellers need to ensure that the A1 form is valid for their travel destination country. If not, the travellers must inform the HRS immediately, and ideally at least 2 weeks before the business trip, in order to update the A1 form.

Please note:

The traveller must carry the A1 form when travelling. (A digital version of the A1 form is sufficient.)

### 3.1.2 After the travel

- Once they have returned from the business trip, the traveller is required to fill out the BBMRI-ERIC TEC Form and submit this together with the **original receipts**, including any boarding passes (original or copy), and – if applicable – the meeting agenda (i.e. in the case of an EU Project) to the CO. If no physical receipt of an expense is provided during the trip, please take a screenshot with your mobile phone or provide other digital evidence of the expense incurred. The traveller should upload any digital copies of the submitted receipts to their individual travel folder. The traveller must submit the documents and the TEC within **2 weeks** of returning from the trip.

Please note:

The traveller should make sure that they have submitted all documents and receipts and uploaded any digital copies of these to the individual travel folder. Otherwise the CO and Finance Department cannot process the request for reimbursement, and delays may occur.

- The CO reviews and checks the provided documents (TEC and receipts) to verify that they are complete and accurate, then forwards these to the Finance Department for approval and reimbursement.

#### **The following expenses are eligible for reimbursement:**

All means of travelling (e.g. flights, train rides, etc.), accommodation (see “economic principle”; in case of organizer-recommendations it is feasible to follow those in order to allow for networking), meals and non-alcoholic beverages (if not provided by the meeting organiser), registration fees, or respective mileage allowance (covering the costs of fuel etc.; see current [Austrian national guidelines](#)), business-related photocopying, and internet access.

#### **Special travel requirements:**

Certain special travel arrangements and measures required or recommended for a travel (i.e. visas, vaccination or prophylactic treatments) are eligible for reimbursement. The Ministry of Foreign Affairs in the respective country can provide further information regarding the required travel requirements. The travellers are responsible for informing themselves about special travel requirements before going abroad.

## 3.2 General considerations and limitations

People travelling on behalf of BBMRI-ERIC should consider that it is a publicly funded organisation. Therefore, travellers should make their travel arrangements under the consideration of ecological and economic principles.

Travellers should also please bear in mind that travel expenses are only eligible for reimbursement if the costs incurred comply with the general travel policy.

## **Air travel**

In general, CO will book economy class tickets for the traveller. Requests to book any other ticket (e.g. a flexible flight ticket) or tickets in a higher service category to access other advantages due to a promotion or special offer need to be filed with the HoD.

Travel to long-distance destinations (i.e. those that require more than 5 hours of continuous flight time to reach) qualify for business class tickets.

Travellers are authorised to allot frequent flyer miles from business travel to their personal airline card.

When cancelling flights (e.g. due to illness, schedule conflicts), the deadlines set by the respective airline must be observed. CO will clarify any resulting costs (e.g. cancellation fees or refunds) with the travel agency.

When planning short business trips (i.e. one overnight stay only), travellers should consider not booking additional luggage (so that no check-in is necessary), if the booked category and airline allows this.

## **Train travel**

In general, CO will book economy class tickets for the traveller. For long distance (longer than 4 hours) 1<sup>st</sup> class, and for overnight travel a sleeping cabin can be booked.

Travellers who plan to travel frequently by train have the option to purchase an “OEBB Vorteils card” (or any equivalent) that enables them to receive cheaper fares for each journey. The HoF / DG must evaluate and discuss the possibility of this purchase with the traveller before such a purchase is made. Once the card has been purchased, the travellers are authorised to allot business travel to this card and use the benefits personally.

## **Car travel**

Reimbursement for the use of personal vehicles is made on a cost-per-kilometre basis, which is also referred to as ‘mileage allowance’ (see current [Austrian national guidelines](#)). The official mileage allowance comprises flat-rate compensation for all costs incurred by using a private vehicle for travel purposes on behalf of BBMRI-ERIC.

The official cost per kilometre covers the following expenses: amortisation/depreciation, gasoline and oil, maintenance and repairs due to ongoing use, additional equipment (e.g. winter tires, snow chains), taxes and fees, all forms of insurance, financing costs (credit or lease payments), domestic and foreign tolls, etc.

Reimbursement for the use of personal vehicles should not exceed the amount of an economy class airfare or

train ticket, including all associated costs (e.g. transportation costs to and from the airport).

To receive reimbursement, the traveller must fill out the driver's logbook ([Logbook Form](#)) and submit this together with all required documents (e.g. TEC, invoices, receipts).

### **Car rental**

Travellers may rent economy-class vehicles (compact and similar vehicles). If more than 4 persons travel by car, a higher category allowing for the additional space requirement may be chosen.

When renting a car, the traveller should also purchase the full insurance package offered by the rental agency. BBMRI-ERIC will also reimburse the traveller for any expenses incurred for fuel.

### **Taxi/Uber**

If the use of public transport is not reasonable, the costs of taking a taxi (e.g. shuttle fares, Uber) to/from the airport (or train station) and/or from one venue to another venue that are incurred by the employee will be reimbursed if all required documents (e.g. TEC, invoices, receipts) are provided.

However, public transport should be used whenever possible!

### **Accommodation**

BBMRI-ERIC foresees that actual, reasonable accommodation expenses are reimbursable. Travellers should search for hotels that provide moderate and reasonable comfort, rather than deluxe or luxury hotels. If BBMRI-ERIC (i.e. the CO) does not make the reservation, the traveller should use their best judgment when selecting reasonable accommodation.

### **Expenses in a foreign currency:**

Expenses incurred in a foreign currency must be converted by the traveller into EUR based on either the daily exchange rate as per the transaction date or on the exchange rate used by the credit card company. The daily exchange rate is determined by the [European Central Bank \(ECB\)](#):

## Travel insurance

All travellers are insured by a corporate travel insurance, which covers assistance services, medical services, and luggage insurance. In the case of a travel emergency, please call the 24 h emergency telephone number: +43 1 50 444 00 (European Travel Insurance).

In the case of an emergency related to the flight booking or a flight cancellation, please contact the airline service or the travel agency (BTU – Business Travel United) directly by using the following hotline:

24 h hotline: +43 316 57 17 17.

## 4. REFERENCES

### 4.1 References to other BBMRI-ERIC documents

- Travel Expense Claim form: BBMRI-ERIC Travel Expense Claim form\_V2.0 (to be filled out after the travel, filed on [TEC](#), (please use the desktop app version to open the file:



- Driver's logbook: BBMRI-ERIC\_Driver's\_Logbook\_V1.0 (to be filled out after the travel, filed on [Logbook](#))
- ONLINE TRAVEL FORM ([LINK](#))
- PERSONAL DIRECTORY/Folder ( [LINK](#) )

### 4.2 References to regulations, links, guidelines, etc.

- A1 form for business trips: current version filed in BambooHR/Documents/A1
- [oesterreich.gv.at](http://oesterreich.gv.at) (information regarding cost-per-kilometre/mileage allowance)
- [EU regulation \(EC\) 883/2004](#) (regarding further information on the A1 form)
- Emergency Card for Corporate Travel Insurance (CTI®) (filed on [SharePoint](#))
- Exchange rate calculations: [ECB](#)



## 5. TERMS AND ABBREVIATIONS<sup>1</sup>

- BTU – Business Travel United
- Business travel – to travel on behalf of BBMRI-ERIC to one or more destinations, perhaps with a certain frequency (e.g. travelling for projects, internal team meetings, internal retreats, strategic meetings)
- CO – Central Office
- CTI<sup>®</sup> – Corporate Travel Insurance
- DG – Director General
- EC – European Commission
- ECB – European Central Bank
- EU – European Union
- GDPR – General Data Protection Regulation
- HoD – Head of Department
- HoF – Head of Finance
- HQ – Headquarters
- HRS – Human Resources Specialist
- OEBB – Austrian Federal Railways
- Open-jaw flight – An open-jaw flight is a roundtrip itinerary that arrives in one city but departs from another.
- TEC – Travel Expense Claim

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<sup>1</sup> In alphabetical order