

## **ERASMUS**

European Region Action Scheme for the Mobility of  
University Students

### **Higher Education Student Finance in England 2012/13 Academic Year**

**Dec 2011**

#### **HIGHER EDUCATION STUDENT SUPPORT IN ENGLAND 2012/13: ERASMUS**

Attached is guidance for assessors which provides guidance on HE Student Support for students who are participating in the ERASMUS scheme.

This guidance is designed to assist with the interpretation of the Student Support Regulations as they stand at the time of publication. It does not cover every aspect of student support nor does it constitute legal advice. Whilst every endeavour has been made to ensure the information contained is correct at the time of publication, no liability is accepted with regard to the contents and the Education (Student Support) Regulations 2011 remain the legal basis of the student support arrangements for the academic year 2012/13. In the event of anomalies between this guidance and the Regulations, the Regulations prevail. Please note the Regulations are subject to amendment.

#### **ENQUIRIES**

If you have any queries on this guidance, please contact:

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### Introduction

1. This guidance looks at the particular eligibility criteria for students who are undertaking a period abroad as part of their course under the ERASMUS scheme, either on a study placement, a work placement, or a combined work and study placement. References to regulations relate to the Education (Student Support) Regulations 2011.
2. The main eligibility criteria can be found in the guidance on 'Assessing Eligibility'.
3. Portal guidance relating to ERASMUS study can be found in the Administration section of this chapter.

### Policy

What is ERASMUS?

4. ERASMUS (European Region Action Scheme for the Mobility of University Students) is the higher education strand of the Lifelong Learning European Community programme funded by the European Commission. The main aim of Erasmus is to promote mobility of university students, teachers and academic staff throughout Europe through a system of partnerships between universities and colleges in the 33 countries currently participating in the scheme (certain non-EU countries are also included in the ERASMUS programme). A full list of the countries taking part in the ERASMUS scheme can be found at Annex 1. SFE will wish to note that as of 1<sup>st</sup> June 2011 Switzerland is now part of the ERASMUS scheme.
5. ERASMUS placements abroad last from a minimum of three months to a full academic year (at least 24 weeks excluding weekends and the usual holidays). Students are not eligible for ERASMUS study placements in the first year of study (but these placements can take place in any year of study after that), however they are eligible for ERASMUS work placements in the first year of study. SFE should note that students may be allowed more than one ERASMUS grant during a course.

Work placements under the ERASMUS scheme

6. ERASMUS allows students to participate in study placements, work placements, or combined work and study placements abroad. The programme works on the basis that the ERASMUS student must be enrolled at a higher education institution which holds an ERASMUS University Charter. ERASMUS work placements have to be recognised by the HEI and will contribute to the final qualification. This is because the training agreement between a student, an HEI and a host enterprise abroad sets out the specific programme for the student to complete. This means that the ERASMUS work placement is contained within a three or four year undergraduate course, and students do not stay in higher education for additional time like students on sandwich placements. ERASMUS work placements are not sandwich placements. It is participation in ERASMUS that is the overriding factor for determining the amount of statutory financial support received by the student, not the type of ERASMUS placement that the student undertakes.

## Fee support for ERASMUS students

### Full-year ERASMUS

7. The position of students taking part in the Lifelong Learning ERASMUS exchange is unique. The arrangements are intended to operate mainly on a reciprocal basis. The rules of the scheme are such that students cannot be charged tuition fees by the receiving institution. UK students on ERASMUS exchanges are not required to pay the fees of incoming EU ERASMUS students.
  
8. The tuition fee waiver, or concession, is available for UK student who go abroad on ERASMUS for a full academic year ('ERASMUS year'). It is provided for in **regulation 25(4) for old-system students and regulation 19(2) for current-system students**. **Old-system** students are not eligible for SFE assessed fee support for any academic year in which they are participating in the ERASMUS scheme and all the periods of study or work during that year are at an institution outside the United Kingdom. Such students are not required to make a contribution towards their tuition fees. **Similarly, current-system students who spend a full academic year abroad under the ERASMUS scheme will not be charged tuition fees by their institution and are therefore not eligible for a tuition fee loan.** This is the case regardless of the subject of study or type of ERASMUS placement. Instead, the Higher Education Funding Council for England (HEFCE) compensates institutions via the block grant for the loss in fee income from such students. Similar provision is made for students whose courses are at institutions in Scotland, Wales and Northern Ireland. Since 2003/04, HEFCE's compensation arrangements have been based on actual numbers of outgoing students. This means that institutions who have boosted their numbers receive additional funding, while those who have experienced a decline receive less.

The tuition fee waiver, or concession, is not available to all students who take part in the ERASMUS scheme.

#### Students for whom the tuition fee waiver applies:

- **old-system** students who, but for their full year on ERASMUS, would otherwise be eligible for a grant for fees under **regulation 25** of the student support regulations;
- **old-system** students who, but for their full year on ERASMUS, would otherwise be eligible for a grant for fees under **regulation 25** but are liable for 100% contribution towards their tuition fees under the income assessment contribution; **and**
- **current-system students who, but for their full year on ERASMUS, would otherwise be eligible for a tuition fee loan under regulation 19 of the student support regulations.**

#### Students for whom the tuition fee waiver does not apply:

- **old-system** students who are not eligible for a grant for tuition fees under **regulation 25** and **current-system students, who are not eligible for a tuition fee loan**, because of previous study;
- students who are not eligible for any student support under the student support regulations, for example because they do not meet the residence criteria.

The fees for these students are set by institutions themselves and it is for the institution concerned to determine what fees a student in this situation should pay.

### Part-year ERASMUS

9. The ERASMUS tuition fee waiver only applies to eligible students who spend a full academic year abroad under the ERASMUS scheme (including any periods of work experience under the scheme and regardless of the subject of study). The definition of a complete academic year for this purpose is at least 24 weeks (excluding weekends and the usual holidays). Within the rules of the ERASMUS scheme, students cannot spend a full year abroad if it is spread across two different academic years.
10. **Old-system** students who spend a year abroad which spans two academic years may be liable for an income-assessed contribution for the full rate tuition fee of **£1,380** in the first academic year and the half rate tuition fee of **£680** in the second academic year (regulation 31(2)). 'Current system students who started their courses before September 2012, might be charged fees of up to £3,465 in the first academic year and up to £1,725 in the second academic year (where the periods of full-time study at the UK institution are in aggregate, less than 10 weeks. (Reg 23(6)(a)). New current system students who started their courses on or after 1 September 2012 at publicly funded institutions might be charged up to £6,000, or where an access agreement is in place, up to £9,000 for the first academic year. Where the periods of full-time study at the UK institution are, in aggregate, less than 10 weeks, fees of up to £3,000 and £4,500 respectively might be charged for the second academic year.
11. **Old-system** students who go abroad only for part of a year under the Erasmus arrangements will be liable for an income-assessed contribution of **£1,380** towards tuition fees, **£680** where the periods of full-time study at the home institution are in aggregate less than 10 weeks. Current system students who started their courses before 1 September 2012 can be charged fees of up to £3,465, **£1,725** where the periods of full-time study at the home institution are in aggregate less than 10 weeks. New current system students who started their courses on or after 1 September 2012 at publicly funded institutions might be charged up to £6,000, or where an access agreement is in place, up to £9,000 for the first academic year. Where the periods of full-time study at the UK institution are, in aggregate, less than 10 weeks, fees of up to £3,000 and £4,500 respectively might be charged for the second academic year. Students who are abroad for a whole academic year but only part of that year is under the ERASMUS scheme are liable for an income-assessed contribution of up to **£680** towards their tuition fees if they are an old-system student, they could be charged variable fees of up to **£1,725** if they are a current-system student who began their course before September 2012 or they could be charged up to £4,500 if they are a new current-system student who began their course after 1 September 2012
12. Please refer to the guidance in the chapter on 'Assessing Eligibility' for students who spend a period abroad, which is not under the ERASMUS scheme.

### Students from elsewhere in the EU

13. Students from elsewhere in the EU studying at a UK HEI and eligible for fees support from England and taking part in the ERASMUS scheme are eligible for the tuition fee concession in the same way as UK students.

#### Maintenance support (grants and loans)

14. There are no special provisions in the student support regulations for the assessment of living costs support (grants and loans) for students undertaking a period abroad under the ERASMUS scheme. Such students should be considered for grants and loans for living costs in the usual way **depending on** whether they are (i) old system students or (ii) current system students who are 2008, 2009 or 2012 cohort students and current system students who are not defined under the cohort categories. The overriding factor for consideration is that such students participate in the ERASMUS scheme, and it is not relevant whether they undertake a period of ERASMUS mobility for the purpose of work, study, or combined work and study. Work placements under ERASMUS scheme are not sandwich placements, as explained in paragraph 6.

#### Travel grant

15. Where ERASMUS students meet the eligibility criteria for travel grant under regulation 52, they shall be eligible for a grant equal to such reasonable expenditure which they are obliged to incur within or outside the United Kingdom for the purpose of attending, as part of their course, an overseas higher education institution. The first £303 of such expenditure is disregarded when determining the amount of travel grant due.
16. SFE have responsibility for assessing eligibility for and entitlement to the travel grant. It is therefore for SFE to determine whether expenditure is reasonable. However, in determining whether expenditure is reasonable, SFE should not take into account students' income from other sources such as ERASMUS grant, for example. The student's contribution depends on the household income which is determined in accordance with paragraph 3 of Schedule 4 of the Regulations and is applied to grants and loans in accordance with regulation 102 for old-system students,, regulations 101 for current-system students who are not 2008, 2009 or 2012 cohort students, regulations 100 for 2008, 2009 and 2012 cohort students as described below and in the 'Assessing Financial Entitlement' guidance chapter.

#### The financial assessment

17. Paragraph 4 of Schedule 4 to the regulations provides for the calculation of students' income by reference to 'taxable income'. Any payments made to students under the ERASMUS scheme shall be disregarded when determining students' income because such payments are non-taxable.

#### Application of the household contribution

18. For old-system students on a full-year ERASMUS scheme who are not eligible for tuition fee support under regulation 25(4), the household contribution is reduced by a notional £1,380 before the contribution is applied to any grant for dependants, then the portion of the student loan subject to income assessment and finally, any travel grant (regulation 102(5)). For current-system students who are not 2008, 2009 or 2012 cohort students, the household contribution is applied in full first to any grant for dependants, then the income-assessed portion of the student loan and lastly, any travel grant (regulations 101 and 104). For current-system students who are 2008, 2009 or 2012 cohort students, the household contribution is applied in full first to any grant for dependants, then the long courses loan and lastly, any travel grant (regulations 100 and 103).

19. Old-system students who spend part of the year abroad under the ERASMUS scheme and who are liable for an income-assessed contribution of up to £680 towards their tuition fees should have any remaining unspent contribution reduced by a notional £680 before this is applied to dependants grant, student loan and travel grant (regulation 102(4)).
20. See the chapter on 'Assessing Financial Entitlement' for further information on the calculation of the student or household contribution and its application to the assessed student support.

## Administration

21. Where a student indicates in Section 4(f) of the PN1, or Section 3(j) of the PR1 'About Your Course, and your College or University' that they have been accepted onto the ERASMUS exchange scheme the system will flag the application status as 'Pending SFE manual assessment'.
22. As stated above at paragraph 5, ERASMUS **study** periods cannot take place in the student's first year of study, but ERASMUS **work** placements may.
23. Students need to have taken at least one year of prior study to be eligible for an Erasmus study period.
24. Therefore, SFE should be careful to check the validity of an indication on form PN1 (and any PR1 form completed by a first year student in error), either paper or on-line, that the student will be taking part in the ERASMUS scheme. Form PN1 is most likely to have been submitted by a prospective first year student.
25. The SFE assessor will be required to validate (Validate Evidence Screen) that appropriate evidence/information has been received from the student's HEI and is satisfactory.
26. The Assessment Summary screen will display a message for the SFE assessor to check the information shown on the screen. Generally, the rules engine will return an assessment to show that tuition fees are not payable (as these are funded through the tuition fee waiver concession if a student is on an ERASMUS placement for a full academic year, as stated in paragraph 8). The value of maintenance loan shown will depend on the student's circumstances.
27. Using information provided by the student, it is the responsibility of the SFE assessor to determine the student's entitlement, check the entitlement result returned by the rules engine, edit and amend fields where appropriate and resubmit to the rules engine.
28. Refer also to the LA Portal System User Guide Section 12 'Performing the Assessment' which explains automated, semi-automated, manual assessment and using the assessment summary screen.
29. General guidance on the administration of student support for students can be found in 'Guidance on General Eligibility and Financial Assessment Administration'.

## Annex 1

### LIST OF COUNTRIES IN THE ERASMUS SCHEME

All member states of the EU participate in the ERASMUS scheme. These are:

Austria	Latvia
Belgium	Lithuania
Bulgaria	Luxembourg
Cyprus	Malta
Czech Republic	Netherlands
Denmark	Poland
Eire	Portugal
Estonia	Romania
Finland	Slovakia
France	Slovenia
Germany	Spain
Greece	Sweden
Hungary	United Kingdom
Italy	

ERASMUS also includes the EU accession countries (Turkey and Croatia ) and the European Economic Area (EEA) countries (Iceland, Liechtenstein and Norway). From academic year 2011/12 Switzerland now participates in the Erasmus Scheme. Please note the scheme in Former Yugoslav Republic of Macedonia is currently suspended.