

<ERASMUS>

(European Region Action Scheme for the Mobility of University Students)

Higher Education Student Finance in England 2017/18 Academic Year – Version 0.1 January 2017

Summary

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.

The main eligibility criteria can be found in the guidance document - 'SFE Assessing Eligibility 2017/18'. Administration guidance relating to ERASMUS study can be found in the Administration section of this chapter

Disclaimer

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 or a definitive statement of the law. 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 Regulations remain the legal basis of the student support arrangements for the Academic Year (AY) 2017/18. In the event of anomalies between this guidance and the Regulations, the Regulations prevail. Please note the Regulations are subject to amendment.

ERASMUS study and/or work placements cannot be undertaken if the student attends a private HEP in the UK.

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Abbreviations

Abbreviation	Full
AY	Academic Year
DCI	Development and Cooperation Instrument
ECHE	ERASMUS Charter for Higher Education
EDF	European Development Fund
EEA	European Economic Area
HEP	Higher Education Provider
HE	Higher Education

PI	Partnership Instrument
OFFA	Office of Fair Access
SFE	Student Finance England
TFL	Tuition Fee Loan

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FOR THE LATEST INFORMATION ON ERASMUS+, HE PRACTITIONERS SHOULD CONTACT THE UK NATIONAL AGENCY FOR ERASMUS+ AT: BRITISH COUNCIL TEL: 0161 957 7755 EMAIL: ERASMUSPLUS.ENQUIRIES@BRITISHCOUNCIL.ORG WEBSITE: HTTPS://WWW.ERASMUSPLUS.ORG.UK/	11
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1 What is Erasmus

ERASMUS (European Region Action Scheme for the Mobility of University Students) is the higher education strand of the European Union Erasmus+ programme (formerly Lifelong Learning 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 (the 28 EU Member States and certain non-EU countries, a

full list of the countries taking part in the ERASMUS scheme can be found at Annex 1.) Please note - From 1 January 2014 Switzerland ceased to be part of the Erasmus scheme.

ERASMUS placements abroad last from a minimum of two months (work placements) or three months (study placements) to a full academic year. 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.

Students may be allowed more than one ERASMUS grant during a course provided their time abroad does not exceed 12 months in total. Note that although the Erasmus scheme permits postgraduate students to undertake mobility, the advice in this guidance is applicable only to first degree (undergraduate) students.

2 Placements under ERASMUS

The ERASMUS scheme 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 provider (HEP) which holds an Erasmus Charter for Higher Education (ECHE). ERASMUS work placements have to be recognised by the HEP and will contribute to the final qualification. This is because the training agreement between a student, an HEP 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 HE 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.

3 Fee Support for ERASMUS

3.1 Definition of an ERASMUS year

The definition of an ERASMUS Year in 2017/18 is set out in Regulation 2(1) of the Education (Student Support) Regulations 2011, as amended by the Education (Student Support and European University Institute) (Amendment) Regulations 2013.

“Erasmus year” means an academic year of a course where a student is participating in the action scheme of the EU for the mobility of university students known as ERASMUS and the student’s course is a course referred to in regulation 5(1)(d) and—

- *where the course began on or after 1st September 2012 and is provided by an institution in England or Wales—*
 - *at least one period of study or work placement is attended at an institution or workplace outside the United Kingdom (as the case may be); and*
 - *either—*
 - *in respect of that academic year the aggregate of any one or more periods of full-time study at the institution in the United Kingdom is less than 10 weeks; or*
 - *in respect of that academic year and any previous academic years of the course the aggregate of any one or more periods of attendance which are not periods of full-time study at the institution in the United Kingdom (disregarding intervening vacations) exceeds 30 weeks; or*

- where the course began before 1st September 2012, all the periods of study or work placement during the academic year are attended at an institution or workplace outside the United Kingdom (as the case may be);
- where the course began on or after 1st September 2012 and is provided by an institution in Northern Ireland or Scotland, all the periods of study or work placement during the academic year are attended at an institution or workplace outside the United Kingdom (as the case may be).

3.2 Definition history and fees across domiciles

The definition of an ERASMUS Year from AY 2014/15 onwards in the Regulations was updated to take account of the policy to charge English domiciled students starting their courses at English HEPs on or after 1 September 2012 (2012 cohort students) who were undertaking an ERASMUS study or work placement, up to £1,350 in fees (15% of the then maximum £9,000 fee) and allowed students to apply for a Tuition Fee Loan (TFL) of up to £1,350 to meet the costs of their tuition at HEIs in England and Wales. This amount has increased to £1,385 in line with the increases in the maximum TFL that can be charged in England.

Corresponding changes were made to Fees Regulations from AY 2014/15 onwards in respect of maximum fees for English HEIs. The pre AY 2014/15 definition of an ERASMUS year and the fee waiver for full year ERASMUS will continue to apply in AY 2017/18 for (a) English domiciled students who started their courses at English HEPs before 1 September 2012 and (b) English domiciled students studying at HEPs in Northern Ireland.

The introduction of tuition charges for 'ERASMUS years' for England, Wales and NI (rUK) students attending Scottish HEPs from AY 2017/18 brings Scotland in line with England and Wales, who made the same change in 2014/15. There is therefore no longer a fee waiver for students studying ERASMUS years in Scotland and HEPs will also be able to charge up to £1,385.

4 Full-Year ERASMUS

4.1 Full –Year ERASMUS with reduced fees

Students undertaking ERASMUS for a full academic year who are charged tuition fees and are eligible to apply for a TFL.

In AY 2017/18, students who started a course on or after 1 September 2012 at an HEP in England and who are undertaking a full year ERASMUS study or work placement may be charged up to £1,385 for tuition at a publicly funded HEP (or up to £920 if no access agreement is in place with the Office for Fair Access (OFFA)).

Fee loan caps are set out in Regulation 23 of the Education (Student Support) Regulations 2011, as amended by the Education (Student Support and European University Institute) (Amendment) Regulations 2013 and the Education (Student Support) (Amendment) Regulations 2014.

4.2 Tuition Fee Waiver

Students listed below who are undertaking a full year ERASMUS placement are not charged fees by their HEP (tuition fee waiver) and are not eligible for Tuition Fee Loans (TFLs).

The tuition fee waiver, or concession, is available in AY 2017/18 for:

- English domiciled students who started their course at a UK institution before 1 September 2012 and who go abroad for a full academic year on an ERASMUS placement in AY 2017/18 (students who started a course on or after 1 September 2012 who are undertaking a full year ERASMUS study or work placement may be charged up to £1,385)
- English domiciled students who started their course on or after 1 September 2012 who are attending a HEP in Northern Ireland and go abroad for a full academic year on an ERASMUS placement in 2017/18.

The tuition fee waiver does not apply to:

- Students who are not eligible for tuition support 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 HEPs themselves and it is for the institution concerned to determine what fees a student in this situation should pay.
- For 17/18, students who started a course on or after 1 September 2012 at a HEP in England and who are undertaking a full year ERASMUS study or work placement may be charged up to £1,385 for tuition at a publicly funded HEP (or up to £925 if no access agreement is in place with the Office for Fair Access (OFFA)).

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 holidays). Within the rules of the ERASMUS scheme, students cannot spend a full year abroad on an ERASMUS placement if it is spread across two different academic years.

5 Part-Year ERASMUS

Students starting their courses before 1 September 2012

In AY 2017/18 current system students who started their courses before 1 September 2012 at institutions in England can be charged fees of up to £3,465 or up to £1,725 where the periods of full-time study at the UK institution are in aggregate less than 10 weeks. Students can apply for a TFL of up to £3,465 or £1,725 to meet the cost of their fees.

Current system students who started their courses before 1 September 2012 at institutions in England and who are abroad for a whole academic year, but only part of that year is under the ERASMUS scheme, are liable for tuition fees of up to £1,725. Eligible students can apply for a tuition fee loan of up to £1,725 to meet the costs of their fees

Current system students who started their courses before 1 September 2012 at institutions in England who spend time on an ERASMUS placement that spans two academic years can be charged fees of up to £3,465 in the first academic year and up to £1,725 in the second academic year of their course.

Students starting their courses on or after 1 September 2012

- The reduced rate TFL for students undertaking a full year on an ERASMUS placement for AY 2017/18 is also available to students on an ERASMUS work or study placement for part of the year. In AY 2017/18, students who commence their course on or after 1 September 2012 at publicly funded HEPs

in England can be charged up to £1,385 for their tuition or up to £920 where no access agreement is in place with OFFA.

- In AY 2017/18, students who started their courses on or after 1 September 2012 and spend time on an ERASMUS placement that spans two academic years may be charged fees of up to £9,250 in the first academic year and up to £1,385 in the second academic year.

Students studying at HEPs in Scotland, Wales and Northern Ireland on an ERASMUS placement in AY 2017/18

Students who started their courses on or after 1 September 2012 and are studying on a course in Wales or Scotland who are undertaking an ERASMUS study or work placement in AY 2017/18 will be subject to the same fee charging and student support arrangements as those studying at an English HEP. The full year ERASMUS fee waiver will continue to apply to all English domiciled students studying at HEPs in Northern Ireland.

Maximum fee loans for students studying at HEPs in Scotland, Wales and Northern Ireland who are undertaking an ERASMUS study or placement year in AY 2017/18 as defined above are set out in the following tables:

1. Fee loan caps for English Domiciled Students undertaking an 'Erasmus Year' in 2017/18				
Public	Course provided at institution in...	Fee loan cap (please see the definition of Erasmus year on page 3 which describes when these rates apply)		
		Course started before 1st August 2012	Course started between 1st August - 31st August 2012	Course started on or after 1st September 2012
ERASMUS available at Publicly funded institution only	England	n/a (fee waiver)	n/a (fee waiver)	£1,385
	Wales	n/a (fee waiver)	n/a (fee waiver)	£1,385
	Scotland	n/a (fee waiver)	n/a (fee waiver)	£1,385
	Northern Ireland	n/a (fee waiver)	n/a (fee waiver)	n/a (fee waiver)

2. Fee loan caps for English Domiciled Students undertaking Part-Year Erasmus Study or Part-Year Erasmus Work Placements in 2017/18				
Public	Course provided at institution in...	Fee loan cap (please see the information on 'Part year Erasmus year' on page 6 which describes when these rates apply)		
		Course started before 1st August 2012	Course started between 1st August - 31st August 2012	Course started on or after 1st September 2012

Publicly funded institution	England	£1,725	£1,725	£1,385
	Wales	£1,725	£1,385	£1,385
	Scotland	£1,725	£1,385	£1,385
	Northern Ireland	£1,925	£4,625	£4,625

Please refer to the guidance in the chapters on ‘Assessing Eligibility’ and ‘Assessing financial entitlement’ for students who spend a period abroad, which is not under the ERASMUS scheme.

6 Students from elsewhere in the EU

EU nationals studying at an English HEP and taking part in the ERASMUS scheme will be subject to the same fee and fee support arrangements as English domiciled students.

7 Maintenance Support

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 assessed for grants and loans for living costs in the usual way depending on **whether** students 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. Students on ‘ERASMUS years’ are eligible to apply for the overseas rate of maintenance loan.

8 Travel Grant

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 HE institution or undertaking a work placement overseas or a combination of both. The travel grant is therefore available for all eligible ERASMUS students undertaking study, work or combined work and study periods overseas as part of their course. The first £303 of such expenditure is disregarded when determining the amount of travel grant due. The travel grant is also subject to an income assessment

Student Finance England (SFE) are responsible for assessing the eligibility for and entitlement to the travel grant. It is therefore for SFE to determine whether expenditure is reasonable. However, in determining this, SFE should not take into account the student’s income from other sources such as ERASMUS grant. 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 101 for current system students who are not 2008, 2009 or 2012 cohort students, and regulation 100 for 2008, 2009 and 2012 cohort students as described below and in the ‘Assessing Financial Entitlement’ guidance chapter.

9 The Financial Assessment

Schedule 4 of the Education (Student Support) Regulations 2011, as amended by the Further and Higher Education (Student Support) (Amendment) Regulations 2014, provides for the calculation of students’

household income for full-time living costs support by reference to 'taxable income'. Any payments for fees under the ERASMUS scheme are disregarded when determining students' income, such payments are not taxable.

10 Application of Household Contribution

For current system students who are not 2008, 2009 or 2012 cohort students, the household contribution is applied in the following way:

- Applied in full first to any grant for dependants
- Then the income assessed portion of the student loan
- 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).

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.

11 Previous Study and ERASMUS

ERASMUS study and work placement Years that meet the definition of 'ERASMUS year' which are being undertaken by English domiciled students who started their courses in England and Wales on or after 1 September 2012 are included in the definition of 'ordinary duration' and 'standard academic year' in AY 2017/18. This means that 'ERASMUS years undertaken at institutions in England, Wales and Scotland in AY 2017/18 are counted as years of previous study when calculating entitlement to tuition fee loans'. See the chapter on 'Assessing Eligibility' for further information.

12 Administration

Where a student indicates on the online or paper application for new or returning students that they have been accepted onto the ERASMUS exchange scheme the system may flag the application status as 'Pending SFE manual assessment' if the time spent on ERASMUS is **not** for the full year. Otherwise that application should switch over to 'Awaiting validation' ready for assessment and approval.

As stated above at 'What is ERASMUS?' section, ERASMUS **study** periods cannot take place in the student's first year of study, but ERASMUS **work** placements may take place then.

Therefore, SFE should be careful to check the validity of an indication on the application (either paper or online), that the student will be taking part in the ERASMUS scheme. For instance, the PN1 Form and its online equivalent is most likely to have been submitted by a prospective first year student.

Should the processing information below be in a Policy Spec?

SFE assessor will be required to validate (using the Validate Evidence Screen) that appropriate evidence/information has been received from the student's HEP and is satisfactory.

The Assessment Summary screen will display a message for the SFE assessor to check the information shown on the screen. The value of the maintenance loan shown will depend on the student's circumstances. 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.

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.

13 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
Croatia	Malta
Cyprus	Netherlands
Czech Republic	Poland
Denmark	Portugal
Eire	Romania
Estonia	Slovakia
Finland	Slovenia
France	Spain
Germany	Sweden
Greece	United Kingdom
Hungary	
Italy	

ERASMUS also includes the EU candidate countries (Turkey and the former Yugoslav Republic of Macedonia) and the European Economic Area (EEA) countries (Iceland, Liechtenstein and Norway).

In AY 2017/18, students will also be able to undertake Erasmus+ study placements, but not work placements, in most third countries (referred to as ‘partner countries’). Students from institutions in the partner countries will also be able to participate. A list of partner countries is included below; note that mobility to regions 5 and 12 is not possible.

Students who wish to study in other institutions that have signed an ‘inter-institutional agreement’ with their institution should note that studying at an institution located in a specific Partner Country under the scheme is only possible if the institution has requested and received Erasmus+ funding for this country and their institution is located in a Programme Country (such as the UK).

14 Other Partner Countries

Some Actions of the Programme are open to any Partner Country of the world listed below. For some other Actions the geographical scope is less broad.

The Partner Countries below are regrouped according to the financial instruments of the EU external action.

Region 5	Andorra, Monaco, San Marino, Vatican City State, Switzerland
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Region 6¹ - Asia	Afghanistan, Bangladesh, Bhutan, Cambodia, China, DPR Korea, India, Indonesia, Laos, Malaysia, Maldives, Mongolia, Myanmar, Nepal, Pakistan, Philippines, Sri Lanka, Thailand and Vietnam
Region 7² - Central Asia	Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan
Region 8³ - Latin America	Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, Venezuela
Region 9⁴	Iran, Iraq, Yemen
Region 10⁵	South Africa
Region 11⁶ - ACP	Angola, Antigua and Barbuda, Belize, Cape Verde, Comoros, Bahamas, Barbados, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Central African Republic, Chad, Congo (Brazzaville), Congo (Kinshasa), Cook Islands, Côte d'Ivoire, Djibouti, Dominica, Dominican Republic, Eritrea, Ethiopia, Fiji, Gabon, Gambia, Ghana, Grenada, Republic of Guinea, Guinea-Bissau, Equatorial Guinea, Guyana, Haiti, Jamaica, Kenya, Kiribati, Lesotho, Liberia, Madagascar, Malawi, Mali, Marshall Islands, Mauritania, Mauritius, Micronesia, Mozambique, Namibia, Nauru, Niger, Nigeria, Niue, Palau, Papua New Guinea, Rwanda, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Solomon Islands, Samoa, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Sudan, Sudan, Suriname, Swaziland, Tanzania, East Timor, Togo, Tonga, Trinidad and Tobago, Tuvalu, Uganda, Vanuatu, Zambia,
Region 12 - Industrialised Gulf Cooperation countries	Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates.
Region 13⁷ - Other Industrialised countries	Australia, Brunei, Canada, Hong Kong, Japan, (Republic of) Korea, Macao, New Zealand, Singapore, Taiwan, United States of America.

¹ Classification used in the framework of the Partnership Instrument (PI)

⁸ Classification used in the framework of the Partnership Instrument (PI)

⁹ Classification used in the framework of the Partnership Instrument (PI).

Annex A

This guidance applies to full-time students and those who are treated as full-time students for the purposes of the Education (Student Support) Regulations 2011, as amended by -

- the Education (Student Support) (Amendment) Regulations 2015
- the Education (Student Support) (Amendment) Regulations 2014.
- the Special Educational Needs (Consequential Amendments to Subordinate Legislation) Order 2014
- the Further and Higher Education (Student Support)(Amendment) Regulations 2014,
- the National Treatment Agency (Abolition) and the Health and Social Care Act 2012 (Consequential, Transitional and Savings Provisions) Order 2013,

¹ Classification used in the framework of the Development and Cooperation Instrument (DCI)

² As above

³ As above

⁴ As above

⁵ As above

⁶ Classification used in the framework of the European Development Fund (EDF)

- the Universal Credit (Consequential Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013,
- The Education (Student Fees, Awards and Support) (Amendment) Regulations 2012 and;
- The Education (Student Support and European University Institute) (Amendment) Regulations 2013.

Annex B

Date	Updates
5 April 2016 (v1.0)	First version published

Annex C

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

Student Finance England
 Practitioners Support Team
 Tel: 0300 100 0618
 Email: ssin_queries@slc.co.uk

Annex D

For the latest information on Erasmus+, HE Practitioners should contact the UK National Agency for Erasmus+ at:

British Council
 Tel: 0161 957 7755
 Email: erasmusplus.enquiries@britishcouncil.org
 Website: <https://www.erasmusplus.org.uk/>