

# ERASMUS

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

## Higher Education Student Finance in Wales 2017/18 Academic Year – Version 0.1 February 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 - 'SFW Assessing Eligibility 2017/18'. Administration guidance relating to ERASMUS study can be found in the Administration section of this chapter.

**All rates of support described in this document for academic year 2017/18 ("AY 17/18") are detailed in the Financial Memorandum, which is available at:**

<http://www.studentfinancewales.co.uk/practitioners/policy-information/information-notices.aspx>

### Disclaimer

This guidance is designed to assist with the interpretation of the Education (Student Support) (Wales) Regulations 2017. 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
HEP	Higher Education Provider
DCI	Development and Cooperation Instrument
EDF	European Development Fund

EEA	European Economic Area
HE	Higher Education
HEP	Higher Education Provider
PI	Partnership Instrument
OFFA	Office for Fair Access
SFW	Student Finance Wales
TFL	Tuition Fee Loan

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## 1 What is Erasmus

ERASMUS or the European Region Action Scheme for the Mobility of University Students is the higher education strand of the European Community 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 (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.

(Please note - From 1 January 2014 Switzerland ceased to be part of the Erasmus scheme.)

ERASMUS placements abroad last from a minimum of three months 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.

## 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 institution which holds an Erasmus Charter for Higher Education (HE). ERASMUS work placements have to be recognised by the Higher Education Provider (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

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The definition of an ERASMUS Year for 2014/15 onwards in the Education (Student Support) (Wales) Regulations has been updated to take account of new tuition fee and support arrangements in Wales and England.

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

- where the course begins before 1 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;
- where the course begins on or after 1 September 2012 and is provided by an institution in Northern Ireland, all the periods of study or work placement during the academic year are attended at an institution or workplace outside the United Kingdom; or

- where the course begins on or after 1 September 2012 and is provided by an institution in England, Scotland or Wales—
  - at least one period of study or work placement during the academic year are attended at an institution or workplace outside the United Kingdom; and
  - either—
    - all the periods of—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 any intervening vacations) exceeds 30 weeks.

### **3.2 Definition history and fees across domiciles**

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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 £1,385 in fees (15% of the then maximum £9,250 fee) and allowed students to apply for a Tuition Fee Loan (TFL) of up to £1,385 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 HEPs. 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 Support available**

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Welsh domiciled students starting their courses at HEPs in Wales, England or Scotland on or after 1 September 2012 (2012 cohort students) who are undertaking an ERASMUS study or work placement in 2017/18 onwards will be charged a tuition fee up to 15% of the institution’s maximum fee cap (this would be up to £1,385 The Student Fees (Amounts) (Wales) Regulations 2011 have been amended in respect of maximum fees for Welsh HEPs.

A tuition combination of loan/grant of up to £1,385 is available to 2012 cohort students undertaking an Erasmus study or placement year in 2017/18. These changes apply to both new and continuing 2012 cohort students from the 2014/15 AY onwards.

Where £1,385 is available in tuition support it is split as follows, £710 tuition loan and £675 grant. Please note, where the fee charged by the HEP is less than the maximum chargeable amount, the tuition fee loan

entitlement will still be 50% of the maximum fee chargeable. The remainder of the fee charged will be paid as fee grant. For example, where £1,000 is being charged, £710 in tuition fee loan is still available; however the tuition fee grant will be reduced to £325.

#### **4.2 Tuition Fee Waiver**

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The ERASMUS tuition fee waiver, or concession, is still available to some students who take part in the ERASMUS scheme. Students to whom the tuition fee waiver for the ERASMUS year may apply are:

- Student studying at an HEP in Northern Ireland and spending a full year on the ERASMUS scheme
- 'New system' (prior to 2012 cohort) students who, but for their full year on ERASMUS, would otherwise be eligible for a tuition fee loan under regulation 18 of the student support regulations.

#### **4.2 Full –Year ERASMS without fee Waiver**

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

- New and continuing students who commenced an ERASMUS year at an HEP in Wales, England or Scotland on or after 1 September 2012 will not be eligible for the tuition fee waiver, from academic year 2016/17 They will however be eligible for tuition fee loans and grants, see 'Definition of an ERASMUS Year' above.
- 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 institutions themselves and it is for the institution concerned to determine what fees a student in this situation should pay.

## **5 Part-Year ERASMUS**

The new reduced rate tuition support for 2012 cohort students on ERASMUS from 2014/15 onwards is also available to students on ERASMUS for part of the year. From academic year 2014/15 going forward, **new system** students who commence their course on or after 1 September 2012 at publicly funded HEPs in Wales, England or Scotland may be charged up to £1,385 where the higher tuition fee amount is permitted. Corresponding tuition fee support of up to these maximum amounts will be available (Regulations 16, 19 & 20). A tuition combination of loan/grant of up to £1,385 is available to 2012 cohort students undertaking an ERASMUS study or placement year from AY 2014/15 onwards.

The ERASMUS tuition fee waiver (available to certain groups as detailed above) 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 on an ERASMUS study placement if it is spread across two different academic years.

These changes apply to both new and continuing 2012 cohort students from the 2014/15 AY onwards. Please note - students can't take part in the ERASMUS scheme in the 1st year of study or at a Private HEP. Where £1,385 is available in tuition support it is split as follows, £710 (50%) tuition loan and £675 grant (50%).

Please note, where the fee charged by the HEP is less than the maximum chargeable amount, the tuition fee loan entitlement will still be 50% of the maximum fee chargeable. The remainder of the fee charged will be paid as fee grant.

Please note: Part-year ERASMUS will now be considered as an 'ERASMUS year' in the student support regulations for students commencing a course on or after 1 September 2012 at an HEP in Wales or England from the 2014/15 academic year onwards.

#### **Students starting their courses before 1 September 2012**

New system students who started their courses **before** 1 September 2012 can be charged fees of up to **£3,465** (or **£4,030** where the student's institution is in Northern Ireland), or **£1,725** (or **£2,005** where the student's institution is in Northern Ireland) where the periods of full-time study at the UK institution are in aggregate less than 10 weeks (regulation 19). This is the same for students who are abroad for the whole academic year, but only part of the year is under the ERASMUS scheme. It is also true for students who started their courses **before** 1 September 2012 who spend time on an ERASMUS work placement that spans two academic years.

#### **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.
- 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 on ERASMUS for part of the year, who commenced a course on or **after** 1 September 2012 in Northern Ireland may be charged up £9,250 with support available to that level (Tuition Fee Loan of up to £4,296 Tuition Fee Grant of up to £4,954) or £4,625 (Tuition Fee Loan of up to £2,065, Tuition Fee Grant of up to £2,560) where the periods of full time study at the UK institution are in aggregate less than 10 weeks.

#### **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 England 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 a Welsh HEP. The full year ERASMUS fee waiver will continue to apply to all Welsh domiciled students studying at HEPs in Northern Ireland.

Maximum fee loans for students studying at HEPs in Scotland, England 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:

<b>1. Fee loan caps for Welsh Domiciled Students undertaking an 'Erasmus Year' in 2017/18</b>		
<b>Public</b>	<b>Course</b>	<b>Fee loan cap (please see the definition of Erasmus year on page 3 which describes when these rates apply)</b>

	provided at institution in...	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 Welsh Domiciled Students undertaking Part-Year Erasmus Study or Part-Year Erasmus Work Placements in 2017/18

	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
<b>Public</b>				
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	£2,005	£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 HEP in Wales and taking part in the ERASMUS scheme will be subject to the same fee and fee support arrangements as Wales 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 considered for maintenance grants and loans for living costs in the usual way.

Part 5 of the Regulations sets out the general qualifying conditions specific to grants for living and other costs. These include amongst other factors (please read the full text of regulation 23):

- students from elsewhere in the EU who are not EEA migrant workers or the spouse or child of an EEA migrant worker, are not eligible for living costs grants; except in the cases of those students meeting the conditions of the EU directive, and those students meeting the conditions of the Bidar judgement;
- students in receipt of an income assessed NHS Bursary are not eligible for living costs grants;
- students on a course for the initial training of teachers where the periods of full-time attendance are in aggregate less than 6 weeks, are not eligible for living costs grants; and
- students on a sandwich course where, in the academic year in question, the periods of full-time study are in aggregate less than 10 weeks, are not eligible for living costs grants unless the periods of work experience constitute unpaid service.

## **8 Travel Grant**

Where ERASMUS students meet the eligibility criteria for travel grant under regulation 33, 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 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.

SFW has responsibility for assessing eligibility for and entitlement to the grant. It is therefore for SFW to determine whether expenditure is reasonable. However, in determining whether expenditure is reasonable, SFW should not take into account students' income from other sources such as the British Council's ERASMUS grant, for example. The student's contribution depends on the household income which is determined in accordance with Schedule 5 of the Regulations and is applied to grants and loans in accordance with regulation 34 for 'new system' students (all cohorts), as described below and in the 2017/18 'Assessing Financial Entitlement' guidance chapter.

## **9 The Financial Assessment**

Schedule 5 to the regulations provides for the calculation of students' income by reference to 'taxable income'. Any payments made to students under the British Council's ERASMUS grant scheme shall be disregarded when determining students' income because such payments are non-taxable.

## **10 Application of Household Contribution**

For 'new system' students (all cohorts) 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. Please see the 2017/18 guidance 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 Welsh 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 SFW 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 the 'What is ERASMUS?' section at paragraph 3, ERASMUS **study** placements, as opposed to **work** placements, cannot take place in the student's first year of study; students need to have taken at least one year of prior study to be eligible.

Therefore, SFW 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 study scheme. Form PN1 and the online equivalent are most likely to have been submitted by a prospective first year student.

The SFW assessment officer will be required to validate (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 SFW assessment officer to check the information shown on the screen. The value of maintenance loan shown will depend on the student's circumstances.

Using information provided by the student, it is the responsibility of the SFW assessment officer 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.

## 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

Formatted: French (France)

Greece  
Hungary  
Italy

United Kingdom

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, 9 and 12 is not possible, but it is permitted to region 11 from this year.

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.

<b>Region 5</b>	Andorra, Monaco, San Marino, Vatican City State, Switzerland
<b>Region 6<sup>1</sup> - Asia</b>	Afghanistan, Bangladesh, Bhutan, Cambodia, China, DPR Korea, India, Indonesia, Laos, Malaysia, Maldives, Mongolia, Myanmar, Nepal, Pakistan, Philippines, Sri Lanka, Thailand and Vietnam
<b>Region 7<sup>2</sup> - Central Asia</b>	Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan
<b>Region 8<sup>3</sup> - Latin America</b>	Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, Venezuela
<b>Region 9<sup>4</sup></b>	Iran, Iraq, Yemen
<b>Region 10<sup>5</sup></b>	South Africa
<b>Region 11<sup>6</sup> - ACP</b>	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,

<sup>1</sup> Classification used in the framework of the Development and Cooperation Instrument (DCI)

<sup>2</sup> As above

<sup>3</sup> As above

<sup>4</sup> As above

<sup>5</sup> As above

<sup>6</sup> Classification used in the framework of the European Development Fund (EDF)

	Somalia, South Sudan, Sudan, Suriname, Swaziland, Tanzania, East Timor, Togo, Tonga, Trinidad and Tobago, Tuvalu, Uganda, Vanuatu, Zambia,
<b>Region 12<sup>1</sup> - Industrialised Gulf Cooperation countries</b>	Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates.
<b>Region 13<sup>11</sup> - Other Industrialised countries</b>	Australia, Brunei, Canada, Hong Kong, Japan, (Republic of) Korea, Macao, New Zealand, Singapore, Taiwan, United States of America.

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

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

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

## Annex A

Date	Updates
20 March 17 (v1.0)	<b>First version published</b>

## Annex B

### ENQUIRIES

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

Higher Education Division

Welsh Government

E-mail

[studentfinancedivision@wales.gsi.gov.uk](mailto:studentfinancedivision@wales.gsi.gov.uk)

## Annex C

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](mailto:erasmusplus.enquiries@britishcouncil.org)

Website: <https://www.erasmusplus.org.uk/>