

ERASMUS

European Region Action Scheme for the Mobility of University Students

Higher Education Student Finance in Wales

2016/17 Academic Year – version 1.0

Attached is guidance for assessors 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. The Education (Student Support) (Wales) Regulations 2015 (the “Regulations”) (as amended) are the legal basis of the student support arrangements for the academic year 2016/17. 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:

Higher Education Division

Welsh Government

E-mail

studentfinancedivision@wales.gsi.gov.uk

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/>

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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.

The main eligibility criteria can be found in the 2016/17 guidance on 'Assessing Eligibility'.

Administration guidance relating to ERASMUS study and work placements can be found in the 'Administration' section of this chapter.

DEFINITIONS

2. Student cohorts entering higher education and the ERASMUS scheme:

- 'New system' students (including 2010 and 2011 cohort but not 2012 cohort) are students entering higher education up to and including academic year 2011/12;
- '2012 cohort' students are students entering higher education thereafter (from academic year 2012/13 onwards);
- 'ERASMUS rules' referring to decisions made by the European Union (EU) on the operation of the ERASMUS scheme which may be found in the Erasmus programme guides located here - www.erasmusplus.org.uk; and
- 'Regulations' refer to the Education (Student Support) (Wales) Regulations 2015 (as amended).

POLICY

WHAT IS ERASMUS?

3. ERASMUS (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 ('a full year' is 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. Students may be allowed more than one ERASMUS grant during a course provided their time abroad does not exceed 12 months in total.

PLACEMENTS UNDER THE ERASMUS SCHEME

4. 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 Charter for Higher Education. 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 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

DEFINITION OF AN ERASMUS YEAR

5. 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. Welsh domiciled students starting their courses at HEPs in Wales and England on or after 1 September 2012 (2012 cohort students) who are undertaking an ERASMUS study or work placement in 2014/15 onwards will be charged a tuition fee up to 15% of the institution's maximum fee cap (this would be up to £1,350 where the higher tuition fee amount is permitted and up to £600 (Welsh institutions) or £900 (English institutions) where the basic amount is permitted). 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 £1,350 is available to 2012 cohort students undertaking an Erasmus study or placement year in 2016/17. 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 if they study at a Private HEP.

Where £1,350 is available in tuition support it is split as follows, £675 tuition loan and £675 grant. Where £600 is available in tuition support it is split as follows, £300 tuition loan and £300 grant. Where £900 is available in tuition support it is split as follows, £450 tuition loan and £450 grant (regulation 21 for loan and regulation 17 for 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, £675 in tuition fee loan is still available; however the tuition fee grant will be reduced to £325.

The pre 2014/15 definition of an ERASMUS year and the fee waiver for full year ERASMUS will continue to apply in 2016/17 for (a) Welsh domiciled students who started their courses at English and Welsh HEPs before 1 September 2012 and (b) Welsh domiciled students studying at HEPs in Scotland and Northern Ireland. The new definition of an ERASMUS Year for 2014/15 onwards is set out in the Education (Student Support) (Wales) Regulations 2015 (as amended):

“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) 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 Scotland or 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 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.*

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 or Scotland 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.

Students for whom the tuition fee waiver does not apply:

- New and continuing students who commenced an ERASMUS year at an HEP in Wales or England, 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 a Tuition fee loans and grants, see ‘Definition of an ERASMUS Year’ above.
- Students who are not eligible for a 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.

PART-YEAR ERASMUS

6. 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 or England may be charged up to £1,350 where the higher tuition fee amount is permitted and up to £600 (Welsh institutions) or £900 (English institutions) where the basic amount is permitted. Corresponding tuition fee support of up to these maximum amounts will be available (Regulations 17 & 21). A tuition combination of loan/grant of up to £1,350 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 on page 4 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 £1,350 is available in tuition support it is split as follows, £675 (50%) tuition loan and £675 grant (50%). Where £600 is available in tuition support it is split as follows, £300 (50%) tuition loan and £300 grant (50%). Where £900 is available in tuition support it is split as follows, £450 (50%) tuition loan and £450 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.

Students on ERASMUS for part of the year, who commenced a course on or **after** 1 September 2012 in Northern Ireland or Scotland, may be charged up to £9,000 with support available to that level (Tuition Fee Loan of up to £3,900, Tuition Fee Grant of up to £5,100) or £4,500 (Tuition Fee Loan of up to £1,940, 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.

New system students who started their courses **before** 1 September 2012 can be charged fees of up to **£3,465** (or **£3,925** where the student's institution is in Northern Ireland), or **£1,725** (or **£1,955** 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).

Students who are abroad for a whole academic year, but only part of that year is under the ERASMUS scheme, are liable for tuition charge of up to **£1,725** (or **£1,955** where the student's HEP is in Northern Ireland) if they are a current-system student who began their course **before** 1 September 2012; or fees of up to **£1,350** (or **£4,500** where the student's HEP is in Northern Ireland or Scotland) if they are a new system student who began their course on or after 1 September 2012.

New system students who spend time on an ERASMUS work placement that spans two academic years and started their courses **before** September 2012, may be charged fees of up to **£3,465** (or **£3,925** where the student's institution is in Northern Ireland) in the first academic year and up to **£1,725** (or **£1,955** where the student's institution is in Northern Ireland) in the second academic year (where the periods of full-time study at the UK institution are in aggregate, less than 10 weeks).

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 STUDYING AT HEPS IN SCOTLAND, ENGLAND AND NORTHERN IRELAND ON AN ERASMUS PLACEMENT

7. 2012 cohort students studying on a course in England who are undertaking an ERASMUS study or work placement in 2016/17 will be subject to the same fee charging and student support arrangements as a 2012 cohort student studying at a HEP in Wales. The full year ERASMUS fee waiver will continue to apply to all Welsh domiciled students studying at HEPS in Scotland and Northern Ireland in 2016/17.

Maximum fee loans for students studying at HEPS in Scotland, England and Northern Ireland who are undertaking an ERASMUS study or placement year in 2016/17 as defined on page 4 are set out in the following tables:

1. Fee support caps for Welsh Domiciled Students undertaking an 'Erasmus Year' Placements in 2016/17				
	Course provided at institution in...	Fee support cap (please see the definition of Erasmus year on page 4 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)	£1,350
	Wales	n/a (fee waiver)	n/a (fee waiver)	£1,350
	Northern Ireland/ Scotland	n/a (fee waiver)	n/a (fee waiver)	n/a (fee waiver)
2. Fee support caps for Welsh Domiciled Students undertaking Part-Year Erasmus in 2016/17				
	Course provided at institution in...	Fee support cap		
		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	£1,350
	Wales	£1,725	£1,350	£1,350
	Scotland	£1,725	£4,500	£4,500
	Northern Ireland	£1,955	£4,500	£4,500

*please see 'Part-year ERASMUS' section which will show fee the split between tuition loan grant.

TIME SPENT ABROAD OUT WITH THE ERASMUS SCHEME

8. 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.

STUDENTS FROM ELSEWHERE IN THE EU

9. 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.

MAINTENANCE SUPPORT (GRANTS AND LOANS)

10. 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 **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 though see the full text of regulation 24):

- 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.

TRAVEL GRANT

11. Where ERASMUS students meet the eligibility criteria for travel grant under regulation 34, 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 have 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 2016/17 'Assessing Financial Entitlement' guidance chapter.

THE FINANCIAL ASSESSMENT

12. 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.

APPLICATION OF THE HOUSEHOLD CONTRIBUTION

13. 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 2016/17 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.

ADMINISTRATION

14. 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.

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
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 counties (Turkey and the former Yugoslav Republic of Macedonia) and the European Economic Area (EEA) countries (Iceland, Liechtenstein and Norway).

In 2016/17, 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 in Annex 2; note that mobility to region 5, 9 and 12 is not possible, but is permitted to region 11 from this year. Students who wish to study in other institutions that have signed an 'inter-institutional agreement' with your institution should note that studying at an institution located in a specific Partner Country under the scheme is only possible if your institution has requested and received ERASMUS+ funding for this country, and if your institution is located in a Programme Country (such as the UK).

ANNEX 2**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
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,

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)

	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 12⁷ Industrialised Gulf Cooperation countries	Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates.
Region 13⁸ Other Industrialised countries	Australia, Brunei, Canada, Hong Kong, Japan, (Republic of) Korea, Macao, New Zealand, Singapore, Taiwan, United States of America.

⁷ Classification used in the framework of the Partnership Instrument (PI)

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ANNEX 3**REGULATION REFERENCE CHANGES BASED ON 2016 AMENDMENTS**

2015 Main Regulations	Amendment Regulations
Regulation 2 (Interpretation) paragraph 1 “End-on year” ;“Universal healthcare bursary”	Regulation 3 (a) (b)
Regulation 10 (Time limits) paragraph (2)(e)	Regulation 4
Regulation 12 (Requirement to enter into a contract for a loan)	Regulation 5
Regulation 28 (Grants for dependants – childcare grant) Paragraph 2 , Paragraph 3	Regulation 6 (1) (2)
Regulation 37 (Maintenance grant – new system eligible students who are not new cohort students)	Regulation 7
Regulation 67 (Overpayments)	Regulation 8
Regulation 85 (Overpayments)	Regulation 9
Regulation 88 (Designated part-time courses)	Regulation 10
Regulation 97 (Part-time childcare grant) Paragraph (2) Paragraph (3)	Regulation 11 (1) (2)

Regulation 100 (Part-time grants for dependants – interpretation) Paragraph 1 Paragraph 5 Paragraph 6	Regulation 12 (a), (b) and (c)(d)(e)
Regulation 114 (Overpayments)	Regulation 13
Regulation 124 (Overpayments)	Regulation 14
Please refer to the Schedule in the Amending Regulations	Regulation 15 (Schedule) The Schedule to these Regulations has effect to substitute the figure in the third column of the table for the figure in the second column where it appears in the regulation of the 2015 Regulations set out in the first column.