

ERASMUS

European Region Action Scheme for the Mobility of University Students

Higher Education Student Finance in Wales 2014/15 Academic Year

**TO LOCAL AUTHORITIES AND STUDENT FINANCE WALES
(For the attention of the Student Finance Manager and staff)**

DECEMBER 2013

Dear Colleague

HIGHER EDUCATION STUDENT SUPPORT IN WALES 2014/15: ERASMUS

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 2013 (the "Regulations") are the legal basis of the student support arrangements for the academic year 2014/15. 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.
2. The main eligibility criteria can be found in the 2014/15 guidance on 'Assessing Eligibility'.
3. Administration guidance relating to ERASMUS study and work placements can be found in the Administration section of this chapter.

Definitions

4. 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 British Council's 2014/15 Operation Handbook and associated Annexes which can be found at: <http://www.britishcouncil.org/erasmus-institution-funding.htm>; and
 - 'Regulations' refer to the Education (Student Support) (Wales) Regulations 2013.

Policy

What is ERASMUS?

5. 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. As of 1 June 2011 Switzerland became part of the ERASMUS scheme.
6. 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.

Placements under the ERASMUS scheme

7. 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

Definition of an ERASMUS Year

8. The definition of an ERASMUS Year for 2014/15 in the Education (Student Support) (Wales) Regulations 2013 has been updated to take account of new tuition fee and support arrangements in Wales and England.. Welsh domiciled students starting their courses at HEIs 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 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 will be amended** in respect of maximum fees for Welsh HEIs.
9. A tuition combination of loan/grant of up to £1,350 will be available to 2012 cohort students undertaking an Erasmus study or placement year from AY2014/15. 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 HEI.
10. 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 25 for loan and regulation 20 for grant. The existing definition of an ERASMUS year and the fee waiver for full year

ERASMUS will continue to apply in 2014/15 for (a) Welsh domiciled students who started their courses at English HEIs before 1 September 2012 and (b) Welsh domiciled students studying at HEIs in Scotland and Northern Ireland..

The new definition of an ERASMUS Year for 2014/15 is set out in the Education (Student Support) (Wales) Regulations:

“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—

- (a) 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;
- (b) 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
- (c) where the course begins on or after 1 September 2012 and is provided by an institution in England or Wales—
 - (i) 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
 - (ii) either—
 - (aa) 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
 - (bb) 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.

11. 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 HEI in Northern Ireland or Scotland and spending a full year on the ERASMUS scheme
 - **'New system' (prior to academic year 2012/13) students who, but for their full year on ERASMUS, would otherwise be eligible for a tuition fee loan under regulation 21 of the student support regulations.**

Students for whom the tuition fee waiver does not apply:

- New and continuing students who commenced their course at an HEI in Wales or England, on or after 1 September 2012 will not be eligible for the tuition fee waiver, from academic year 2014/15. They will however be eligible for a Tuition fee loans and grants, see paragraphs 8 and 9 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

12. The new reduced rate tuition support for 2012 cohort students on ERASMUS from the 2014/15 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 HEIs 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. Regulation 20 & 25. A tuition combination of loan/grant of up to £1,350 (will now be available to 2012 cohort students undertaking an Erasmus study or placement year from AY 2014/15.

13. The ERASMUS tuition fee waiver (available to certain groups as detailed in paragraph 11) 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.
14. 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 HEI.
15. 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%).
16. 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 (TFL of up to £3,685, TFG of up to £5,315) or £4,500 (TFL of up to £1,835, TFG of up to £2,665) where the periods of full time study at the UK institution are in aggregate less than 10 weeks.
17. New system students who started their courses **before** 1 September 2012 can be charged fees of up to **£3,465** (or **£3,685** where the student's institution is in Northern Ireland), or **£1,725** (or **£1,835** 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 23
18. 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 **£1,835** where the student's HEI 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 HEI is in Northern Ireland or Scotland) if they are a new system student who began their course on or after 1 September 2012.
19. New system students who spend time on an ERASMUS work placement that spans two academic and started their courses **before** September 2012 may be charged fees of up to **£3,465** (or **£3,685** where the student's institution is in Northern Ireland) in the first academic year and up to **£1,725** (or **£1,835** 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 HEI in Wales or England in the 2014/15 academic year.

Students studying at HEIs in Scotland, England and Northern Ireland on an ERASMUS placement in 2014/15

20. 2012 cohort students studying on a course in England who are undertaking an ERASMUS study or work placement in 2014/15 will be subject to the same fee charging and student support arrangements as a 2012 cohort student studying at a HEI in Wales. The full year ERASMUS fee waiver will continue to apply to all Welsh domiciled students studying at HEIs in Scotland and Northern Ireland in 2014/15.
21. Maximum fee loans for students studying at HEIs in Scotland, England and Northern Ireland who are undertaking an ERASMUS study or placement year in 2014/15 as defined at paragraph 8 and 9 above are set out in the following tables:

1. Fee support caps for Welsh Domiciled Students undertaking Full-Year Erasmus Study or Full-Year Erasmus Work Placements in 2014/15				
	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 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 Study or Part-Year Erasmus Work Placements in 2014/15				
	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	£1,835	£4,500	£4,500

*please see paragraph 14-16 which will show fee the split between tuition loan grant..

Time Spent abroad out with the ERASMUS scheme

22. 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

23. EU nationals studying at an HEI 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)

24. 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.
25. 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 28):
- 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

26. Where ERASMUS students meet the eligibility criteria for travel grant under regulation 38, 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.
27. LAs/SFW have responsibility for assessing eligibility for and entitlement to the grant. It is therefore for LAs/SFW to determine whether expenditure is reasonable. However, in determining whether expenditure is reasonable, LAs/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 regulations 38 for 'new system' students (all cohorts), as described below and in the 2014/15 'Assessing Financial Entitlement' guidance chapter.

The financial assessment

28. 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

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.

29. 2014/15 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

30. 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.
31. As stated above at paragraph 5, 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.
32. Therefore, LAs/SFW 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 study scheme. Form PN1 is most likely to have been submitted by a prospective first year student.
33. The LA/SFW assessment officer will be required to validate (Validate Evidence Screen) that appropriate evidence / information has been received from the student's HEI and is satisfactory.
34. The Assessment Summary screen will display a message for the LA/SFW assessment officer 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 ERASMUS). The value of maintenance loan shown will depend on the student's circumstances.
35. Using information provided by the student, it is the responsibility of the LA/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.

36. Refer also to the LA/SFW Portal System User Guide Section 12 **(TBC)** 'Performing the Assessment' which explains automated, semi-automated, manual assessment and using the assessment summary screen.
37. General guidance on the administration of student support for students, including ERASMUS students, can be found in the 2014/15 '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
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 country (Turkey) 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.