

Is Erasmus+ for all?
A literature review on the calculation of Erasmus grants

by Vera Kopsaj

Previous studies have highlighted the importance of the Erasmus experience at individual, higher education institution and national level. At the individual level, there is a return in terms of personal growth and the labour market; for higher education institutions, incoming and outgoing student flows increase quality and prestige; at the national level, mobility stimulates competitiveness in the labour market, cultural openness and interaction between citizens of different countries (Souto-Otero et al., 2013: 70).

Despite the importance of mobility from an individual, institutional and national perspective, the percentage of students using the Erasmus programme opportunity is still very low (in 2010, only 4% of students went on Erasmus). Although each year, more than 300,000 students study or train under Erasmus+¹, this opportunity is still not available to all students.

Scholars point out that there is a lack of relevant data on the reasons for such low participation in the Erasmus programme. They question whether this is due to a lack of information or to the fact of not having a scholarship (Teichler, 2004: 398-399 in Souto-Otero et al, 2013: 71).

One of the limitations highlighted by the scholars is the lack of a theoretical framework explaining students' motivations and the barriers that prevent them from studying abroad. Research focuses mainly on policy and practice. One block of research focuses also on push-pull factors.

¹ <https://europeancommission.medium.com/10-things-you-didnt-know-about-erasmus-41bb2c8ebd9c>

About 60 percent of non-mobile students see financial aspects as a barrier.

In fact, out of five barrier dimensions identified by the research, financial ones rank first:

1. Financial barriers;
2. Barriers related to the comparability of higher education systems;
3. Information and awareness barriers;
4. Personal barriers;
5. Barriers related to social background.

Our review will focus on the first dimension, as the financial aspect is what interests our analysis, since our aim is to shed light on the new methodologies for calculating Erasmus+ grants.

The Greens/EFA parliamentary group, the fourth largest group in the European Parliament, highlights six ways to improve the Erasmus programme, as Erasmus+ is the best way to bring people together. In first place is the economic factor.

1. Increase the budget;
2. Make the programme more user-friendly;
3. Involve the Non-Formal sector;
4. Give more info on the selection procedure;
5. Rebalance project funding;
6. Embrace inclusivity.

What are the objectives of the Erasmus+ programme and how does the financial part work?

The general objective of the Programme is to support, through lifelong learning, the educational, professional and personal development of people in education, training, youth and sport, in Europe and beyond, thereby contributing to sustainable growth, quality jobs and social cohesion, to driving innovation, and to strengthening European identity and active citizenship².

² 2021 annual work programme. “Erasmus+”: the Union Programme for Education, Training, Youth and Sport, p. 4.

The European Commission (Directorate-General Education, Youth, Sport and Culture) is responsible for the implementation of the Erasmus+ Programme. It manages the budget and sets priorities, targets and criteria for the Programme on an on-going basis. Furthermore, it guides and monitors the general implementation, follow-up and evaluation of the Programme at European level (2021 annual work, p. 5).

The Programme has an overall indicative financial envelope of more than 26 billion EUR¹¹ of the EU Budget for the seven years (2021-2027)³. Implementation by the European Education and Culture Executive Agency (EACEA) is according to the Commission Decision C(2021)951 delegating powers to the European Education and Culture Executive Agency with a view to the performance of tasks linked to the implementation of Union programmes in the field of education, audiovisual and culture, citizenship and solidarity comprising, in particular, implementation of appropriations entered in the general budget of the Union. (ivi, p. 5)

The Erasmus+ Programme is mainly implemented through indirect management. The European Commission delegates implementation tasks to National Agencies established in each Member State and third country associated to the programme, in line with Article 62 (1)(c) and Article 154 of the Financial Regulation. National authorities monitor and supervise the management of the Programme at national level (ivi, p. 6).

As a flagship Union's programme, Erasmus+ will increase investment in initiatives that support learning opportunities for all, educational equity and increase participation rates of people with fewer opportunities, through flexible and simple participation formats, more help prepare and accompany participants in their Erasmus+ learning adventure, but also through financial support for those who thought Erasmus+ is not for them (ivi, p. 7).

In order to achieve the objectives set by the European Union four methods of intervention has been implemented:

- Grants and actions implemented through indirect management;
- Grants and actions implemented through direct management;

³ Erasmus guide programme 2021-2027, p.

- Procurements;
- Experts and Other actions.

Direct management

In direct management, the European Commission is directly responsible for all steps in a programme's implementation:

- launching the calls for proposals
- evaluating submitted proposals
- signing grant agreements
- monitoring project implementation
- assessing the results
- making payments

Indirect management

Some funding programmes are partly or fully implemented with the support of entities, e.g. national authorities or international organisations. The majority of the EU budget allocated to humanitarian aid and international development, for instance, is implemented under indirect management.

Examples include the financial support to fight Ebola outbreak in West Africa and the earthquake in Nepal in 2015. Programmes implemented under indirect management account for around 10% of the overall EU budget.

Under this management mode, the Commission delegates budget execution tasks to different types of implementing partners, for example:

- Third countries or the bodies they have designated;
- International organisations such as the United Nations (UN) family, the World bank, the International Monetary Fund (IMF);
- The European Investment Bank (EIB) and the European Investment Fund (EIF);
- Decentralised agencies such as the European Centre for Disease Prevention and Control (ECDC), the European Food Safety

Authority (EFSA) or the European Border and Coast Guard Agency (Frontex);

- Public-private partnerships, including Joint Undertakings such as Initiative on Innovative Medicines, Shift2Rail, European High Performance Computing (EuroHPC);
- Member States Bodies such as Erasmus+ national agencies, Member States' development agencies, National Promotional Banks⁴.

National Agencies

The EU works with National Agencies to bring the Erasmus+ programme as close as possible to the participants.

The National Agencies are based in EU Member States and third countries associated to the Programme (previously called Programme Countries) and their role involves:

- providing information on Erasmus+
- selecting projects to be funded
- monitoring and evaluating Erasmus+
- supporting applicants and participants
- working with other National Agencies and the EU
- promoting Erasmus+
- sharing success stories and best practices

The European Union Commission grants are implemented as direct and indirect management: «All grants awarded through the National Agencies (marked as NA), are to be considered as indirect management. Grants awarded through direct management will be those marked as EAC, EMPL or EACEA.»⁵. 20% of the overall funding is allocated to the EACEA (European Education and Culture Executive Agency). The other 80% is allocated and distributed by DG EAC (The Directorate-General for Education, Training, Culture and Youth) (Heger, 2013).

⁴ https://ec.europa.eu/info/funding-tenders/find-funding/funding-management-mode_en#indirect-management

⁵ 2021 annual work programme “Erasmus+”: the Union Programme for Education, Training, Youth and Sport, p. 26.

National Agencies are responsible for the implementation of 80% of the total Erasmus funds, but the target group is not only students. In fact, Erasmus plus refers to students, teaching and other staff in higher education institutions.

The National Agencies are for example: in Portugal, Agência Nacional Erasmus+ Educação e Formação; in Italy, Istituto Nazionale di Documentazione per l’Innovazione e la Ricerca Educativa (INDIRE); in Germany, Deutscher Akademischer Austauschdienst (DAAD); in Francia, l’agence Europe-Education-Formation-France; in UK, British Council; etc.

How are Erasmus+ grants calculated at Sapienza University?

At Sapienza University, grants vary according to the duration of the mobility and the country of destination. The EU grant for ‘Long Mobility’ is linked to the cost of living in the destination country and the days of attendance certified by the partner universities.

However, students can apply for the MUR additional contribution, which is calculated on your Equivalent Financial Situation Indicator – ISEE⁶.

Table 1. Monthly grant rate for three country groups (long mobility)

<i>Country group</i>	<i>Monthly grant rate</i>
<i>Group 1 (high cost of living)</i> Denmark, Finland, Iceland, Ireland, Luxembourg, Sweden, United Kingdom, Lichtenstein, Norway, Switzerland	€350
<i>Group 2 (medium cost of living)</i> Austria, Belgium, Germany, France, Greece, Spain, Cyprus, Netherlands, Malta, Portugal	€300
<i>Group 3 (low cost of living)</i> Bulgaria, Croatia, Czech Republic, Estonia, Latvia, Lithuania, Hungary, Poland, Romania, Slovakia, Slovenia, Republic of Macedonia	€250

Source: https://web.uniroma1.it/trasparenza/sites/default/files/Bando%202022-2023_ENG.pdf

⁶ <https://www.unibo.it/en/attachments/2019-20-guide-for-selected-students-erasmus-programme-for-eu-and-swiss-institutes/>, p. 15.

The MUR grant will be calculated based on student's Equivalent Financial Situation Indicator – ISEE (pursuant to Ministerial Decree 1047/2017).

Below are the indications by the Ministerial Decree 1047/2017 about the monthly amounts to be awarded as additional contribution to the Erasmus+ grant, according to the ISEE range:

Table 2. ISEE range MUR and Sapienza contribution/month

<i>ISEE Range</i>	<i>MUR additional contribution/month</i>	<i>Sapienza contribution</i>
ISEE ≤ €15.000	€ 300	€ 100
€15.000 < ISEE ≤ €30.000	€ 200	€ 100
€30.000 < ISEE ≤ €50.000	€ 100	€ 100
ISEE > €50.000	€ 0	€ 100

Source: <https://www.uniroma1.it/it/pagina/esoneri-e-contributi-monetari-gli-studenti-partenza>

The Sapienza Erasmus student, thanks to additional funding from the University and the MUR, receives an average contribution of between €350.00 and €800.00 per month depending on the country of destination and the ISEE value. There are also additional contributions for students with special needs. The Erasmus contribution is compatible with possible national grants and/or loans.

Erasmus EU grants are incompatible with grants from other programmes/actions funded by the European Union. In the case that EU funds are depleted, and/or students receive other university or EU grants, or if students do not require funding, the students may receive an 'Erasmus-Zero-EU-Grant' status that will allow them to enjoy the benefits of the mobility period, but without receiving an EU grant.

Erasmus EU grants are subject to the approval of Erasmus activities/funding, proposed by Sapienza for the Academic Year 2021-22 by INDIRE – the National Agency for Erasmus+.

EU Grant reserved to 'Short Mobility' (limited to Programme Countries), only for PhD students will be paid on the basis of a daily amount.

Table 3. Daily amounts for ‘Short mobility’ at Sapienza University

<i>Duration</i>	<i>Daily amount</i>
‘Short Mobility’ for a period between 5 and 14 days	€70
‘Short Mobility’ for a period between 15 and 30 days	€50

Will disadvantaged students be reached by the EU budget?

EU budget managers were interviewed about what the Erasmus+ budget will look like in the future. They answered: it should be inclusive, impactful, smart, sustainable, greener and digital⁷. This means that these objectives are still to be achieved, despite the many changes included in the new 2021-2027 programme.

In 2018, the budget was EUR 1.8 trillion in current prices, while the long-term EU budget for the period 2021-2027, together with the NextGenerationEU recovery facility, amounts to EUR 2.018 trillion in current prices. This unprecedented response will help repair the economic and social damage caused by the coronavirus pandemic and support the transition to a modern and more sustainable Europe⁸.

What the research highlights is not so much the budget offered by Erasmus+ in general, but the possibility for disadvantaged students to enter into the logic of the mobility opportunity.

Existing literature finds a positive association between individuals with a higher socio-economic background and participation in Erasmus mobility. In contrast, universities that receive socially disadvantaged students also have a lower share of Erasmus mobility. This leads students with a low socio-economic background to face a double disadvantage: first, they have a lower probability of mobility given their background characteristics; second, they are likely to be clustered in those universities and fields of study where mobility opportunities are low (Schnepf, Colagrossi, 2020).

⁷ https://ec.europa.eu/info/strategy/eu-budget/long-term-eu-budget/2021-2027/whats-new_en

⁸ Ibidem.

This creates a kind of vicious circle from which it is difficult to escape. The uptake of mobility might be low in those universities predominantly attended by disadvantaged students, as these students have no demand for mobility. On the other hand, student mobility is higher in universities that are more prestigious and, consequently, more difficult for disadvantaged students to attend.

A better grant system?

A simple and inclusive proposal is 'Erasmus500'. The campaign, run for eight months by the European University Foundation, the Erasmus Student Network and the European Student Union, ended in December 2020. The aim of this campaign was to make the European Commission aware of this new vision of the future of Erasmus+ grants⁹. Five members of the European Commission support Erasmus500.

Erasmus500 calls for reformulating Erasmus grants into a very simple scheme with a universal base of €500 per month, for several reasons:

1) A grant of €500 per month would offer the possibility to compensate working students for the loss of this income during the Erasmus experience, allowing a much larger number of students to participate in the programme. About half of European students work during their studies.

2) This proposal is simpler and more transparent than the current grant system, which is scattered across 18 categories, and Erasmus500 would also include students from disadvantaged backgrounds.

3) In 2018, the average Erasmus grant was €336 per month. According to a survey of 24,000 students, 70% of respondents indicated that the Erasmus grant covers half or less of their total expenses. Erasmus500 would also give the possibility to those without family financial support.

4) A universal basic scholarship system would help better planning.

⁹ <https://erasmus500.eu/>

5) Unit costs would bring less administrative work for universities

What about top-ups? Erasmus500 supports the idea that top-ups should continue to be available for reasons of special needs, socio-economic background or travel to/from outlying regions/countries. Only about 7% of students receive a top-up, so it is not a substitute for a higher scholarship, which aims to increase the overall inclusiveness and attractiveness of the programme.

References

- Souto-Otero M. et al. (2013), Barriers for International Student Mobility: Evidence from the Erasmus Program, *Educational Researcher*, Vol. 42 No. 2, pp. 70-77. Doi: 10.3102/0013189X12466696
- Hühner, K., & Knodt, M. Erasmus Plus and the Bologna Process.
- Kmiotek-Meier (2019), *Why is it so hard? And for whom? Obstacles to intra-European mobility*, «Centrak and Eastern European Online Library».
- Heger, F. (2013). Erasmus—for all? Structural challenges of the EU's exchange programme. *The Erasmus phenomenon—symbol of a new European generation*, 67-78.
- Schnepf, S. V., & Colagrossi, M. (2020). Is unequal uptake of Erasmus mobility really only due to students' choices? The role of selection into universities and fields of study. *Journal of European Social Policy*, 30(4), 436-451.
- Lesjak, M., Juvan, E., Ineson, E. M., Yap, M. H., & Axelsson, E. P. (2015). Erasmus student motivation: Why and where to go?. *Higher education*, 70(5), 845-865.
- Botez, N. (2018). From Erasmus to Erasmus Plus, 30 years in Europe, 20 years in Romania. *Economy Transdisciplinarity Cognition*, 21(1).

Sitography

<https://www.greens-efa.eu/en/who-we-are/our-group>
<https://www.greens-efa.eu/en/article/news/six-ways-to-improve-the-erasmus-programme>
https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/erasmus/agr-contr/general-mga_erasmus_en.pdf
https://ec.europa.eu/info/funding-tenders/find-funding/funding-management-mode_en#indirect-management
https://ec.europa.eu/info/strategy/eu-budget/long-term-eu-budget/2021-2027/whats-new_en
<https://erasmus500.eu/>
https://wayback.archiveit.org/12090/20210927091312/https://ec.europa.eu/programmes/erasmus-plus/about/how-is-it-managed_en
<https://europeancommission.medium.com/10-things-you-didnt-know-about-erasmus-41bb2c8ebd9c>
<https://www.uniroma1.it/it/pagina/esoneri-e-contributi-monetari-gli-studenti-partenza>