European
Commission

Erasmus+
International Credit Mobility

Handbook for Higher Education Institutions

Version 1.0 – February 2017

Contents

Introduction

For 30 years, the European Union has funded the Erasmus programme which has enabled almost 4 million European students to spend part of their studies in another higher education institution (HEI) in Europe. In 2015, Erasmus+ opened up these opportunities to individuals and organisations from other parts of the world. Through the new "International Credit Mobility" action – ICM for short – European HEIs can now set up mobility agreements with partners from around the world, to send and receive students and staff.

What's in it for individuals?

ICM projects aim to help participants acquire key skills, support their professional development and deepen their understanding of other cultures. The Erasmus Impact Study[1] finds that taking part in Erasmus+ is likely to boost a graduate's employability and transversal skills. Unemployment rates among Erasmus participants are 23% lower 5 years after graduation compared to those who did not go abroad. Two-thirds of employers think that international experience is a key asset for job candidates and leads to greater professional responsibility. Staff can acquire new competences for their professional development, improve their language skills and learn about new working methods.

What's in it for institutions?

ICM aims to increase the capacities, attractiveness and international dimension of the organisations taking part. International ties between institutions will be strengthened, giving the partners the opportunity to increase their visibility at local and global levels. Both incoming and outgoing students will be ready to share their positive experiences of studying at your institution.

Purpose of this handbook

This handbook aims to support both Programme and Partner Country HEIs[2] in the implementation of their ICM project, from application to final report. This handbook will provide you with information on the key documents, rules and guidelines you will need to be aware of. It will guide you through the various steps your institution will be expected to take, and tell you where to go for further information. This handbook does not replace the **Erasmus+ Programme Guide**[3] and all ICM guidelines[4], which you should refer to for more detailed information.

We hope you find this handbook useful, and wish you every success with your ICM project.

<div align="right">

The International Credit Mobility Team

</div>

---

[1] Erasmus Impact Study, September 2014:
http://ec.europa.eu/dgs/education_culture/repository/education/library/study/2014/erasmus-impact_en.pdf
[2] The 33 Erasmus+ Programme Countries are the 28 EU Member States, Iceland, Liechtenstein, Norway, the former Yugoslav Republic of Macedonia and Turkey. Partner Countries are all other countries in the world.
[3] http://ec.europa.eu/programmes/erasmus-plus/discover/guide/index_en.htm
[4] Including but not limited to the Do's and Don'ts for Applicants, the Guide on Amendments to the Beneficiary Grant Agreement, the Guidelines for Experts on Quality Assessment, the Technical Guidelines for Completing Application e-Forms and the Quick Guide for Partner Country HEIs.

I – What is ICM and how do I apply?

International Credit Mobility (ICM) supports the mobility of individual participants enrolled or employed at a higher education institution (HEI), namely:

- **Student mobility** for short cycle, first cycle (Bachelor or equivalent) or second cycle (Master or equivalent) students, as well as third cycle doctoral candidates. The mobility period can last from 3 months (or one academic term) to 12 months.[5]
- **Staff mobility for teaching** for academic staff to teach at a partner institution abroad. The length of the mobility period must be between 5 days and 2 months.
- **Staff mobility for training** for teaching and non-teaching staff in the form of training events abroad (excluding conferences) and job shadowing/observation periods/training at a partner HEI. The length of the mobility period must be between 5 days and 2 months.

Student and staff mobility can take place in any subject area or academic discipline. Staff teaching and training activities can be combined. For information on grant amounts, please refer to Part B of the Erasmus+ Programme Guide.

Who can apply?

Any Programme Country HEI is eligible to apply for ICM. Accredited Partner Country HEIs from around the world are also eligible to take part, except those located in regions 5 and 12.[6]

Participating organisations involved in the mobility project assume the following roles and tasks:

- **The applicant organisation** (from a Programme Country) submits an application to its National Agency on behalf of the partnership. The applicant can also apply on behalf of a consortium of several partners from the same Programme Country.
- Once selected, the **beneficiary organisation** (from a Programme Country) signs and manages the grant agreement, and reports at the end of the project. The beneficiary is financially responsible for the entirety of the grant.
- **The sending organisation** (from either a Programme or a Partner Country) is responsible for selecting the students and staff and sending them abroad. This includes preparation, monitoring and recognition activities.
- **The receiving organisation** (from either a Programme or a Partner Country) hosts the students and staff from abroad, providing support during their stay.

Students and staff apply directly to their institution. The selection criteria for participation in the mobility activities are defined by the HEI in which they study or are employed.

---

[5] From the 2018 Call for Proposals (deadline February 2018 tba), ICM will also fund student mobility for traineeships (work placements)

[6] Region 5: Andorra, Monaco, San Marino, Vatican City State, Switzerland
   Region 12: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates
   See the Erasmus+ Programme Guide for full list of regions and Partner Countries

Conditions for application

An HEI may apply for a grant to its National Agency as an individual HEI, or via a consortium application:

- **For an application as individual HEI:** The applicant HEI must hold a valid [Erasmus Charter for Higher Education (ECHE)](#)[7].

- **For an application as national mobility consortium:** The consortium must hold a higher education consortium accreditation. Organisations that do not hold a valid consortium accreditation can apply for this accreditation at the same time as applying for a mobility project. All HEIs involved in the consortium must hold a valid ECHE.

Timeline

Applicants must submit their grant application by the deadline specified in the call for proposals published on the Erasmus+ website, at the latest by 12:00 noon (Brussels time) for projects starting on 1 June of the same year.

ICM projects can run for either 16 or 26 months, to be specified at application stage. The start and end dates of all mobility activities must fall within the start and end dates of the project.

---

[7] https://ec.europa.eu/programmes/erasmus-plus/resources/documents-for-applicants/erasmus-charter-higher-education_en

EU Budget – what you need to know

The EU budget available for this action is split into **12 discrete 'envelopes'** for each region of the world.[8] The size of each envelope is set according to the EU's external priorities, with some regions benefitting from bigger budget envelopes and funding more mobilities. The largest budgets are allocated to the EU's neighbourhood regions – East and South – the Western Balkans, Asia and Russia.[9]

International credit mobility budget by envelope
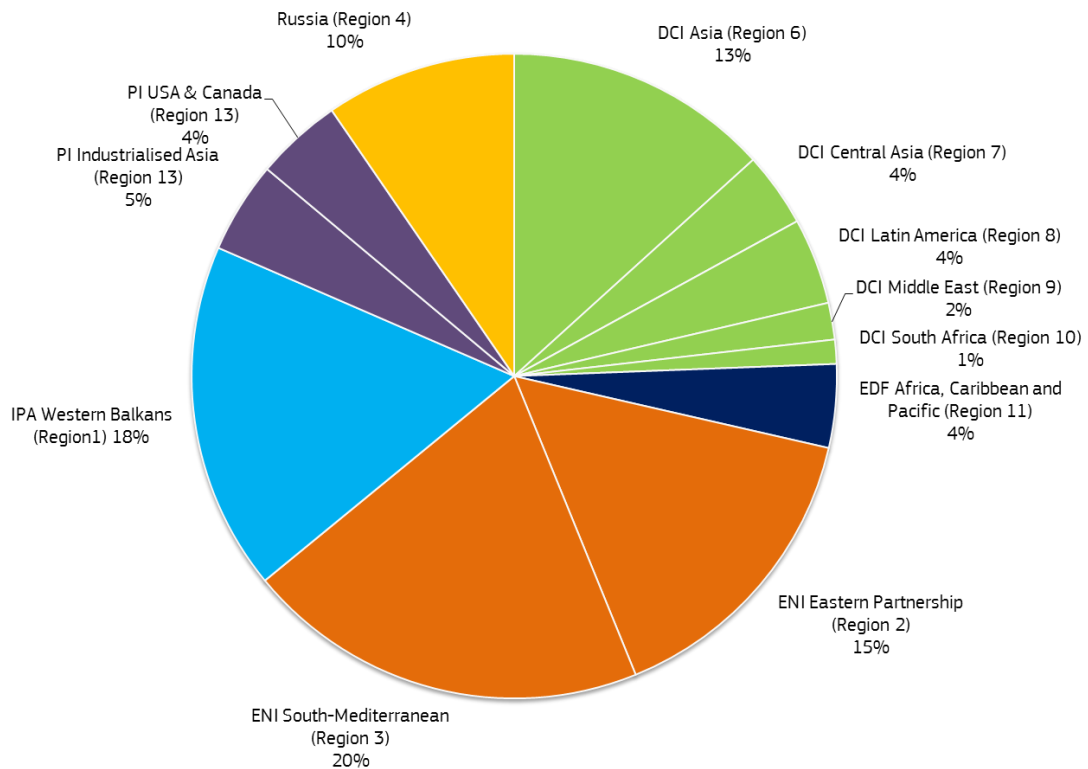
Applicants should always keep the different budgets in mind when applying for mobilities. There may be little point in applying for the entire national budget available in a smaller envelope (for instance South Africa, Latin America or North America) when the National Agency, especially in large Programme Countries, will be under pressure to try and satisfy a large volume of demand from HEIs. On the other hand, competition may be considerably lower for larger budget envelopes, such as the South-Mediterranean, Eastern Partnership and Western Balkans.

---

[8] The number and size of the budget envelopes will remain relatively stable under each call. The Region 11 envelope was added under the 2016 call and the Region 9 envelope under the 2017 call.

[9] Graph: Partnership Instrument (PI), European Neighbourhood Instrument (ENI), Instrument for Pre-Accession (IPA), Development Cooperation Instrument (DCI) and European Development Fund (EDF)

Applicants should also be aware that National Agencies are required to ensure **geographical balance** within envelopes. This means that, all things being equal, National Agencies will be looking to fund projects with partners in low-income and least developed Partner Countries, as well as in the large emerging economies such as China, India, Mexico or Brazil.[10] So if the applicant has the choice between equally strong partners, a strategic decision may be to give preference to the partnerships they have with the least developed countries in a given region.

For more information on the funding rules, budget restrictions and country priorities, please visit the National Agency's website[11] or see the relevant section in the Erasmus+ Programme Guide.

Application process

The Programme Country institution will be filling in the application form on behalf of the partner(s) in Partner Countries and submitting it to its National Agency. We encourage involving all partners in the application process, as the applicant will be asked to provide detailed information on their cooperation arrangements and on the wider impact of their mobility project.

a. Finding a partner

To find a partner, we recommend you look at current or past cooperation agreements your institution might have, either at the level of the institution (typically via the international relations office), or at the level of individual faculties.

If you are looking for new partnerships, we encourage you to contact the National Agency, who might know of interested partners, as well as the National Erasmus+ Offices[12] in a selected number of countries neighbouring the EU. The EU partner search tool may also prove helpful.

If you are reluctant to enter into new cooperation arrangements, you can think about starting with staff mobility to build mutual trust before extending the partnership to sending and receiving students.

b. Getting the right accreditation

Having a valid **Erasmus Charter for Higher Education (ECHE)** is a pre-requisite for all HEIs established in a Programme Country that wish to participate in a mobility project either as a single HEI or as a member of a national mobility consortium. Every year, the European Commission - via the Education, Audiovisual and Culture Executive Agency (EACEA) – publishes a specific call for proposals that sets the detailed conditions to be followed and qualitative criteria to be met in order to be awarded an ECHE.[13]

> **Tips on choosing the right partner**
>
> The institution offers transparent descriptions of its programmes, including learning outcomes, credits, learning and teaching approaches and assessment methods;
>
> Its learning, teaching and assessment procedures are quality assured and can be accepted by your institution without requiring students to take any additional work or examination;
>
> Agreements may not only be made with institutions offering similar programmes, but also with institutions providing complementary programmes.

---

[10] In Asia and Latin America, the EU has set a number of explicit targets which will need to be achieved EU-wide by 2020:
   ✓ at least 25% of the available budget must go to projects with the least developed countries in each region;
   ✓ no more than 30% of the budget available for Asia can go to projects with China and India combined;
   ✓ and no more than 35 % of the budget available for Latin America to Brazil and Mexico combined.

[11] http://ec.europa.eu/programmes/erasmus-plus/contact_en

[12] National Erasmus+ Offices are responsible for the local management of the international dimension of the higher education aspects of the Erasmus+ Programme in 27 Partner Countries outside the EU.

[13] This call is available on the website of the Education, Audiovisual and Culture Executive Agency (EACEA): https://eacea.ec.europa.eu/erasmus-plus/funding/erasmus-charter-for-higher-education-2014-2020_en

HEIs established in a Partner Country must be **accredited** by the relevant national accreditation organisation and should not be subject to EU sanctions. As they are not eligible to receive an ECHE, the principles of the ECHE are enshrined in the **inter-institutional agreement** that they sign with their partner(s).

An organisation from a Programme Country, applying on behalf of a national mobility consortium, must hold a **valid consortium accreditation**. This Certificate is awarded by the same National Agency that assesses the funding request for a mobility project. The requests for accreditation and for mobility projects can be made at the same time. Please read the relevant section in the Erasmus+ Programme Guide to find out more about the conditions to obtain a consortium accreditation.

c. Filling in the application form

The Programme Country institution can only submit **one application** for ICM per Call for Proposals (as opposed to one project application per Partner Country), which should contain information on all the mobility activities they intend to carry out with their partner(s) in one or more Partner Countries. There is no limit to the number of Partner Countries in the proposal, although on applicants will typically include an average of 5 Partner Countries in their proposal. The same institution can also apply for ICM as part of a consortium of universities in its country, in which case they are responsible for **preventing double funding** of the same mobility.

In case of multiple submissions of the same application in the same selection round, the National Agency will consider as valid the **last version submitted** before the application deadline.
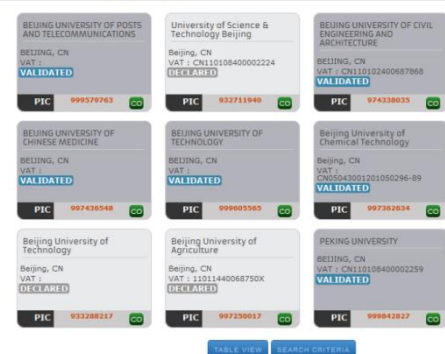
In the application form, the applicant will be asked to provide detailed information on their organisation, on the type and number of mobilities foreseen, on the requested grant amount, as so on. For each Partner Country, they will be asked to explicitly **name the partner institution(s)** they wish to work with. They will also have to answer **four quality questions**, which will be evaluated by experts and which will define whether or not their mobility project (or parts of it) will be selected for funding. Partners should discuss and agree upon the details of their cooperation before writing the application.

PIC Code

Before filling in the application form, the applicant will need their institution's **9-digit Participant Identification Code (PIC)**, which is a unique identifier mandatory for every organisation involved in an ICM project. Partner institutions are also required to have a PIC, albeit at a later stage of the project cycle when encoding mobilities in Mobility Tool+[14]. If the partner already has a PIC, it should be included in the relevant section of the application form. If either institution has already taken part in a European programme such as the former Framework Programme (e.g. FP7), Horizon2020, or the Capacity Building in Higher Education action within Erasmus+, it will already have a PIC. Please carefully check whether your institution already has a PIC before requesting a new one.

If you do not already have a PIC, then you will have to register your institution in the Participant Portal to obtain one. 'Declared' or 'Dormant' PICs are accepted for partner institutions in ICM projects.

---

[14] Mobility tool+ is the web platform tool for collaboration, management and reporting for mobility projects under Erasmus+: http://ec.europa.eu/education/resources/mobility-tool_en

Sections A to K

The application form consists of different sections summarising your mobility project: General Information, Context, Main Activities, Budget, Quality Questions, Check List, Data Protection Notice, Declaration of Honour, Annexes and Submission. All technical aspects linked to these sections are extensively described in the Technical Guidelines for Completing Application e-Forms.

Each set of mobility flows per Partner Country will be **assessed separately,** meaning that the National Agency might decide to fund mobilities with one Partner Country and not the other, or reduce the number of mobilities requested.

A common (but easily avoided) mistake occurs in section *D.1 Activities' Details – Total Duration*, where the applicant will be asked to insert the total duration for all mobilities, and not the individual duration per participant (e.g. 120 months for 10 students, which corresponds to an average of 12 months per participant). Please keep in mind the minimum and maximum duration of mobility periods (3 months (or 1 academic term or trimester) to 12 months for students and 5 days to 2 months for staff), as set out in the Erasmus+ Programme Guide.

In the event that the Declaration of Honour has not been signed by the legal representative of the Programme Country HEI, the applicant should not forget to include a **valid procuration**.

Applicant Organisation Section

In ICM (or KA107) mobility projects, this section refers only to the applicant. HEIs from Partner Countries are added under the "Quality Questions Section".

In the case of national mobility consortia for *Higher education student and staff mobility*, **the coordinator of the consortium applies on behalf of the whole consortium**. The members of the consortium are not mentioned as they are already described in the consortium accreditation application form (KA108).

Profile Section

If the Type of Organisation is prefilled with "Other", the correct organisation type should be selected from the drop-down list, e.g. "HEI (tertiary level)" for HEIs.

Consortium Section

If applying as a single HEI, the applicant should reply 'No' to the question "Are you applying on behalf of a consortium?" in this section. If applying as a coordinator of a higher education mobility consortium, they must reply 'Yes'.

Accreditation Section

- *Applying as a single HEI (HEI)*

If applying as a single HEI, the Programme Country institution must hold the "Erasmus Charter for Higher Education" accreditation. As previously mentioned, the institution should have a single PIC linked to an Erasmus Code. The Erasmus Code is that institution's accreditation reference.

The field "Accreditation Type" will be filled in with "Erasmus Charter for Higher Education (ERASPLUS-ECHE)".

Once the applicant's PIC is entered, the field entitled "Accreditation Reference" (in section C.1.3) will be automatically filled in with the corresponding Erasmus Code (e.g. A WIEN01 in the following table):

C.1.3. Accreditation

Have you received any type of accreditation before submitting this application?

If there are several PICs for your institution, you must choose the PIC linked to your Erasmus Code (which is displayed as accreditation reference below). Please go to the EACEA website for the most recent list of PICs and corresponding Erasmus Codes:

http://eacea.ec.europa.eu/erasmus-plus/actions/erasmus-charter_en

Accreditation Type	Accreditation Reference
Erasmus Charter for Higher Education (ERAPLUS-ECHE)	A WIEN01

If the "Accreditation Reference" field remains empty, the PIC entered is not linked to an Erasmus Code. Please go to the **EACEA website** for the most recent list of PICs and corresponding Erasmus Codes and use the corresponding PIC displayed in this list.

In case of any discrepancy in this list, please contact EACEA: EACEA-ECHE@ec.europa.eu.

- *Applying as the coordinator of a mobility consortium*

If applying on behalf of a higher education mobility consortium, the "Accreditation Type" field will be filled in with "Higher Education Mobility Consortium Accreditation (ERAPLUS-ERA-CONSORTIA)".

If the applicant has a valid consortium accreditation reference number from a successful application for accreditation (KA108) and it remains valid for the current call, it should add this reference number under the "Accreditation Reference' field. An accreditation reference number is structured as follows: 2016-1-ES01-KA108-095947.

If the mobility consortium has no consortium accreditation yet, it must submit a KA108 application for the accreditation of the consortium in parallel to this application. In this case, you have to write "Requested" in the field "Accreditation Reference".

Main Activities Section

The applicant will be asked to enter the outgoing and incoming mobility activities for each of the Partner Countries with which they intend to cooperate. If they choose "incoming", the country of destination will be automatically prefilled with their country.

In the "Activities' Details" table, applicants can select up to three activity types: Staff Mobility for Teaching, Staff Mobility for Training and Student Mobility for Studies. For each activity type, the applicant must list each mobility flow that is to be considered for funding.[15] The budget will then be calculated automatically.

Due to limited budget availability, National Agencies may limit: i) mobility flows in (a) particular degree level(s), for example limiting applications to one or two cycles only – short, first, second or third cycle,[16] ii) mobility for staff only or students only, and iii) the duration of mobility periods. Please consult the **National Agency's website** to find out if any of limitations apply.

Applicants should use the **Distance Calculator**[17] to calculate travel distances. If the city of origin and the host city are the same for all mobility activities in a flow, you should introduce the travel distance between those two cities. If there are different cities of origin and/or host cities in the same Partner Country, we recommend applicants introduce the average of the different travel distances.

---

[15] Please keep in mind the minimum and maximum duration of mobility periods (3 months (or 1 academic term or trimester) to 12 months for students and 5 days to 2 months for staff) as set out in the Erasmus+ Programme Guide.
[16] First cycle (Bachelor or equivalent), second cycle (Master or equivalent), third or doctoral cycle.
[17] http://ec.europa.eu/programmes/erasmus-plus/resources_en#tab-1-4

Section F – Quality Questions (award criteria)

This section is crucially important as it will **determine which projects will ultimately be selected for funding** by the National Agency. To successfully complete this section, the applicant should have a clear idea of whom they are going to work with and how the responsibilities will be divided.

They will have to indicate the unique PIC of each institution they wish to cooperate with. In the event the institution does not have a PIC, they should enter its full legal name. Be sure to **contact all the partner universities before filling in the application.**

The name of each Partner Country indicated in the *Activities' Details* table will appear automatically in the Quality Questions section. For each Partner Country, the applicant will be asked to answer four questions relating to:

1) **the relevance** of the planned mobilities
2) **the quality of cooperation** agreements
3) **the quality of the project design**
4) **its impact and dissemination** for each Partner Country

The **Do's and Don'ts for Applicant HEIs**[18] provide information on these Quality Questions. Using feedback from experienced evaluators in different Programme Countries, they provide suggestions and useful examples of what to include and avoid in the application, in order to increase the chances of the project being selected for funding. The **Guidelines for Experts on Quality Assessment**[19] may also prove useful when filling in this section to shed some light on how each answer will be assessed.

For each Partner Country, the full legal name of each partner institution(s) must be clearly indicated, together with their corresponding PIC (validated or non-validated) if one exists. Remember that the grant agreement between the National Agency and the beneficiary institution will include under Annex I the description of the project provided here and the names of the partner institutions are therefore legally binding.

If the National Agency supports first and second cycle outgoing student mobility to regions 6, 7, 8, 9, 10 and 11, the applicant must clearly indicate in their answer to Question 3: 'Quality of project design and implementation' how many students they plan to send at each study level and the total duration for all participants (months and extra days) for each study level. This information is required for the National Agency to ensure that the requested flows are eligible, according to the secondary criteria that they may have set.

Evaluation Procedure

Once the application has been submitted to the National Agency, it will undergo an evaluation procedure. The National Agency will appoint experts to verify the eligibility and quality of the application, supported by the **Guidelines for Experts on Quality Assessment** prepared by the European Commission.

The expert will start by **assessing the eligibility of all the mobility flows requested**, taking into account all the budget rules and restrictions outlined in the first section of this document.

Once they have passed the eligibility check, all intended mobilities with a particular Partner Country will be assessed separately according to the four quality criteria. Each question will be given a mark out of 20 or 30 as indicated in the guidelines. The total score for the four questions must be over

---

60/100 in order to be considered for funding, with the score for the first criterion on Relevance of the Strategy over 15/30. In other words, no set of mobility flows with a Partner Country scoring below 60 in total and below 15 for the first criterion can be funded. According to the assessment of the quality criteria, the expert may recommend to the National Agency to select only mobilities with certain Partner Countries (e.g. funding the project with South Africa, but not with Chile), or only some mobility flows within a given Partner Country (only students or staff, incoming or outgoing).

Based on the expert's assessment, an evaluation committee will then decide which projects are ultimately selected for funding. In keeping with the goals for geographical balance, the committee can modify the ranked order of projects within a given region in order to ensure better geographical spread. Where possible and in addition to the overarching criteria of order of merit and geographical balance, the National Agency will seek to spread the available budget widely to avoid dominance of a small number of HEIs. The National Agency will strive to be as inclusive as possible, maximising participation of stakeholders without undermining quality, geographic balance or the minimum critical size per mobility project to ensure feasibility.

Grant Award Decision

National Agencies will notify the institutions of their final grant award decision.

Successful applicants will then sign a beneficiary grant agreement with their National Agency.

If you haven't signed an inter-institutional agreement with each of your partners yet, you should do so at this point, and in any case **before the start of the first mobility**.

II – Preparing and implementing the mobility

This section covers the main elements of **managing your international credit mobility project**, using the experience of HEIs and their international office.

- ### The beneficiary grant agreement

If the ICM project has been selected for funding, the beneficiary institution in the Programme Country will have signed a mono-beneficiary Grant Agreement (or multi-beneficiary, if they are part of a national consortium) with their National Agency.

This agreement links the Programme Country HEI to its National Agency for Erasmus+ and provides the financial support for their mobility project. The partner institution is not a direct party to this agreement but their mobility project is described within the grant. This Grant Agreement captures the core of the project and is based on the information that you provided in the application form, which was assessed by a team of evaluators who will have selected the project – or parts of it – for funding.

The annexes of the Grant Agreement[20] detail the activities that have been retained for funding and specify the breakdown of the grant.

In principle, the **selected mobility flows must be implemented in accordance with this annex**. However, certain modifications of the project are possible with or even without an amendment. To find out more, please read the latest version of the [Guide on Amendments to the Beneficiary Grant Agreement.](#)[21]

The grant foresees an **organisational support** (OS) grant for both incoming and outgoing students or staff, to cover costs directly linked to the implementation of mobility activities, such as visits to partners, selection of participants, linguistic preparation, visa and insurance. Any split between participating institutions should be agreed upon by all partners on a mutually acceptable basis and set out in the inter-institutional agreement.

All funding rules and grant amounts are set out in the [Erasmus+ Programme Guide](#).

- ### The inter-institutional agreement

Before the mobility activity can take place, **your institution must sign an** [inter-institutional agreement](#) with the partner institution involved in the project. You and your partner may wish to discuss the content of the agreement while preparing the project application. You should sign this agreement once your project has been selected for funding, and **at the latest before the start of the first exchange**. HEIs are strongly encouraged to discuss the content of the agreement already at the time of application. Inter-institutional agreements must be made available during monitoring visits.

---

[20] In the 2015 Grant Agreements this information was displayed in two separate annexes. Since the 2016 call, this information has been merged into a single document, Annex II to the Grant Agreement.
[21] http://ec.europa.eu/programmes/erasmus-plus/sites/erasmusplus/files/library/ka107-amendment-agreements_en.pdf

Please use the template on the Erasmus+ website.[22] You and your partner are free to customise this template as you see fit detailing how you will select participants, how you will recognise study credits, if and how you will share the organisational support grant, etc.

By signing an inter-institutional agreement, the institutions commit themselves to respecting the principles and quality requirements of the Erasmus Charter for Higher Education (ECHE) relating to the organisation and management of mobility.

Only the central authority at the institution can officially apply for ICM and sign related documents, and not individual faculties. This is the legal representative linked to the Participant Identification Code (PIC), which is typically the rector of that institution. The signature of official documents can be delegated to another representative (such as the dean of a faculty) in exceptional cases and on the condition that:

- The signature by duly delegated deans also commits other services of the institution, such as the admissions office, international office, student support functions, where necessary for the full implementation and respect of the inter-institutional agreement and the learning agreements.

- Cooperation with another faculty in that institution is covered by a separate inter-institutional agreement signed by the dean of that faculty.

The European Commission has not set any rules concerning the use of electronic signatures. Some National Agencies will accept scanned signatures based on national legislation and others will not.

For more information, the answers to the Frequently Asked Questions on the inter-institutional agreement between Programme Countries also apply to agreements with Partner Country institutions.
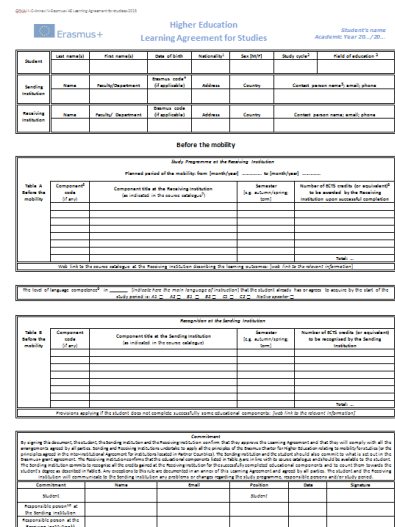
- ### The learning and mobility agreements

Before the mobility can start, the sending and receiving institutions, together with the participant (student or staff), must agree on the activities that the participant will undertake during the period abroad.

The learning agreement[23] sets out the study programme to be followed by the student, defines the target learning outcomes and specifies the formal recognition provisions. For more detailed information, please refer to these Guidelines on how to use the learning agreement for studies.

We recommend using the template provided, as far as possible, as the basis for the Learning Agreement, however:

- Institutions currently producing Learning Agreements or Transcripts of Records using their own IT system may continue to do so.

- Institutions are free to **customize the template** provided by adding additional fields (such as information on the coordinator of a consortium) or adapting the format (e.g. font size and colours). Institutions may also decide to request less information in the Learning Agreement, if such information is already provided in other documents.

---

[22] http://ec.europa.eu/education/opportunities/higher-education/doc/partner-programme-iia_en.pdf

[23] https://ec.europa.eu/programmes/erasmus-plus/resources/documents-for-applicants/learning-agreement_en

In any event, the Learning Agreement must include at least the names of the two institutions, as well as the names and contact details of the student and contact persons at **both the sending and receiving institutions.**

- ### The mobility agreement for staff

Similarly, the mobility agreement for members of staff sets out the teaching or training programme to be followed, and lists the rights and obligations of each party.

The selection of the HEI's staff will be made by the sending institution on the basis of a draft mobility programme submitted by the staff member after consultation with the receiving institution. Prior to departure, the **final mobility programme shall be formally agreed by both the sending and receiving institution** (by exchange of letters or electronic messages).

Both the sending and receiving institution are responsible for the quality of the mobility period abroad.

- ### The participant grant agreement

The participant grant agreement sets out the **financial support and payment arrangements** to the participant. Unlike other documents, this agreement is signed between **the participant and the beneficiary organisation in the Programme Country.** The grant agreement template will be provided by the National Agency.

The agreement must be signed by both parties before the start of the mobility. The Programme Country institution will be responsible for signing the grant agreement with the participant. Unless otherwise specified in the inter-institutional agreement, **the Programme Country institution will administer all grant payments for mobility to Europe ("incoming") and from Europe ("outgoing").**

Participants must receive individual and travel support in a timely manner. In some cases, it will be more advisable to provide the participant with travel support by purchasing the travel tickets in advance. In every case, all details regarding payment deadlines must be agreed before the mobility and included in the grant agreement.

- ### The Erasmus+ Student Charter

The sending institution must give every Erasmus+ student a copy of the Erasmus+ Student Charter once they have been selected. The Student Charter highlights the students' rights and obligations, and is available in all Programme Country languages on the Quality Framework page.[24]
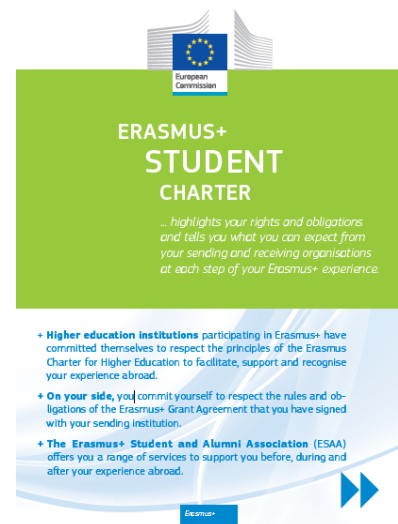
Quality implementation of the project

The Erasmus Charter for Higher Education (ECHE) provides the general quality framework for European and international cooperation activities a HEI may carry out with Erasmus+. The award of an ECHE is a pre-requisite for all HEIs located in a Programme Country and willing to participate in

---

[24] http://ec.europa.eu/education/opportunities/higher-education/doc/charter_en.pdf

learning mobility of individuals and/or cooperation for innovation and good practices under Erasmus+. The Charter is awarded for the full duration of Erasmus+.

The ECHE Annotated guidelines[25] outline the requirements your institution must fulfil in order to comply with the Charter principles. Please also refer to the ECHE Monitoring Guide[26] for information.[27]

While the ECHE is not required for Partner Country HEIs, the quality framework will be established through inter-institutional agreements signed by all partners.

Selection of participants

Students

Students apply to their HEI who carries out the selection of participants in the mobility action. The selection of students must be fair, transparent, coherent and documented and shall be made available to all parties involved in the selection process.

The HEI shall take the necessary measures to prevent any conflict of interest with regard to persons who may be invited to take part in the selection bodies or process of students' selection.

The **selection criteria** (e.g. the academic performance of the candidate, the previous mobility experiences, the motivation, etc.) **shall be made public**. For students from Partner Countries, the first criterion for selecting students will be academic merit, but with equivalent academic level, preference should be assigned to students from **less advantaged socio-economic backgrounds** (including refugees, asylum seekers and migrants).

Lower priority will be given to those who **have already participated** in mobility actions in the same study cycle under the LLP-Erasmus Programme, Erasmus Mundus Programme or Erasmus+ Programme. In the case of Erasmus Mundus Master Courses and Erasmus Mundus Joint Master Degrees, previous participation is only taken into account for scholarship holders.

Once students are selected, they should receive from their sending institution **the Erasmus+ Student Charter**, setting out the student's rights and obligations with respect to her/his period of study abroad, and explaining the different steps to be undertaken before, during and after mobility.

The sending and the receiving institution should have a common understanding regarding selection of participants and should have set a basic time-line for the nomination of mobile students and the acceptance of nominees.

Staff

Staff taking part in a higher education mobility project must be selected by their sending HEI in a fair and transparent way. Prior to their departure, they must have agreed on a mobility programme with the sending and receiving institutions.

The selection of teachers and HEI staff shall be carried out by the HEI according to same principles aforementioned in the students section.

---

[25] https://eacea.ec.europa.eu/sites/eacea-site/files/annotated_eche_guidelines_2016.pdf

[26] https://ec.europa.eu/programmes/erasmus-plus/document-library/eche-monitoring-guide_en

[27] A website – Erasmus Charter for Higher Education: Make it Work for You! – is under development and will feature a self-assessment tool for checking ECHE compliance.

Mobility Tool+

At the earliest once the participants are selected, the beneficiary must encode general information on each participant and the type of mobility activity they will carry out into an online tool, called Mobility Tool+.

Mobility Tool+ (MT+) is an information system designed, developed and maintained by the European Commission. It allows Erasmus+ Beneficiary Organisations to access and manage information on their project, request individual participant reports and submit their final report to their NA. NAs also use MT+ to monitor and validate the project information entered by Beneficiary Organisations at any time.

As stated in the beneficiary grant agreement, the beneficiary organisation is responsible for updating the tool **at least once a month** during the lifetime of the mobility project with any new information regarding the participants and the mobility activities.

Partner Country HEIs will have to be registered in Mobility Tool+ with their unique PIC. Please refer to 'PIC Code' section above.

Support to participants

The sending institution is responsible for selecting participants and providing them with all necessary support including pre-departure preparation, monitoring during mobility, and formally recognising the mobility period. The receiving institution offers participants a study programme, or a programme of staff training or teaching activities at their institution. The [inter-institutional agreement](#) details the obligations of each institution.

Special Needs

Erasmus+ encourages the participation of students and staff with special needs. If one of your selected participants has a physical, mental or health-related situation that would prevent them from participating in a mobility activity unless extra financial support was made available, the Programme Country HEI may request "special needs" support from their National Agency in order to cover the extra costs involved. You will find further information in Part B of the [Erasmus+ Programme Guide](#).

Visa

Participants in Erasmus+ projects may need to obtain a visa for staying abroad in the Programme or Partner Country hosting the activity. It is a responsibility of all the participating organisations to ensure that the authorisations required (short or long-term stay visas or residence permits) are in order before the planned activity takes place. It is strongly recommended that the authorisations are requested from the competent authorities well in advance, since the process may take several weeks. National Agencies may provide further advice and support concerning visas, residence permits, social security, etc. The [EU Immigration Portal](#) contains general information on visa and residence permits, for both short-term and long-term stays.

HEIs must provide assistance, when required, in securing visas for incoming and outbound mobility participants. The HEI must post information about visas and the time needed to obtain a visa on its website and provide documentation to support visa applications in a timely fashion. The website should, if possible, provide details of a contact person who can assist with visa-related issues, with a description of the services offered and the support that can be provided, where possible.

In cases in which it is difficult to obtain visas (e.g. where diplomatic missions are not located in the countries of residence or if postal applications are not accepted), institutions should attempt to help by providing assistance in contacting diplomatic representatives. However, the mobility participants themselves remain responsible for the visa application.

Grant payment of the participant

The student mobility grant is a flat rate grant calculated at a monthly rate. Grants are a **contribution** towards the costs of the planned Erasmus+ mobility period. The grant rate is set at the beginning of every beneficiary agreement and cannot be changed, even after interim reporting. All students should be paid at the appropriate rate. All details regarding payment deadlines must be agreed before the mobility and included in the grant agreement.

Interruption of the mobility

When a mobility period of a student is interrupted, for example because there is a gap between the end of a language course and the start of the actual study period, the number of days of interruption shall be encoded in Mobility Tool+ and the grant amount adapted accordingly.

Early termination of the mobility

According to article 3.6 of the student grant agreement, every National Agency can define the rules for recovery of the grant after early termination of the mobility. The NA can also decide in which cases the return of students was due to *force majeure*.

If the NA considers the student's reason to terminate the mobility to be due to *force majeure*, the mobility has to be marked as force majeure in MT+. Depending on the recovery rules set by the NA, the student might have to return (part of) the grant.

If the NA does not consider the early return to be a case of force majeure, the mobility will not be encoded in MT+ and the grant will have to be refunded.

Prolongation of students' mobility

A prolongation of an ongoing mobility period may be agreed between the sending and the receiving organisations subject to the following:

1. the request for prolongation of the mobility period must be introduced at the latest one month before the end of the mobility period initially planned;
2. if the request is accepted by all parties, the grant agreement must be amended and all the arrangements completed;
3. if the student receives an Erasmus+ grant, the sending institution may either amend the grant amount to take into account the longer duration, or reach an agreement with the student that the additional days are considered "zero-grant from EU funds" period;
4. the actual start and end dates of the mobility period shall be included in the receiving institution's Transcript of Records accordingly:
   - the start date should be the first day that the student needs to be present at the receiving organisation (for example, this could be the start date of the first course);
   - the end date should be the last day the student needs to be present at the receiving organisation.
5. the actual duration defined as indicated above is the period to be indicated by the HEIs in their final reports and is the maximum number of months to be covered through the EU grant. When the prolongation of the student's mobility is considered as "zero-grant from EU funds" days, these days shall be deducted from the total duration of the mobility period to calculate the final grant amount;
6. the additional period must follow immediately after the on-going mobility period.

Making changes to your project

Once the Grant Agreement has been signed and your project is underway, you may find that some of the planned activities can no longer be implemented as foreseen. This page highlights which changes are possible without amending the Grant Agreement, which are the most common changes that require an amendment and the authorisation of your National Agency, and which changes are not possible under any circumstances. Please note that the final grant after amendment cannot exceed the grant requested at application stage for the entire project. For more extensive and detailed information, please consult the Guide on Amendments to the Beneficiary Grant Agreement.[29]

WITHOUT AMENDMENT

You may:

- ✓ set the duration of individual mobilities

- ✓ organise mobilities for a different number of participants than specified in Annex II of the Grant Agreement

- ✓ make changes to study cycles within limitations set on development assistance Partner Countries (since the 2016 call)

- ✓ transfer up to 50% of the funds allocated for organisational support to individual support and travel for student/staff mobility

These changes are possible as long as the minimum and maximum durations set out in the Erasmus+ Programme Guide (i.e. 3 months (or 1 academic term/trimester to 12 months for students; 5 days to 2 months for staff) and any possible secondary criteria set by the National Agency are respected.

WITH AMENDMENT

The funds for travel and individual support can be transferred:

- ✓ Between most categories of staff and students, between incoming and outgoing mobility and between staff training and teaching.[23]

- ✓ The sole exception is that if your original contract does not foresee outgoing student mobility at short, first and second cycles with development assistance Partner Countries mentioned on page 4, then it is unlikely that you can amend your contract to include these types of mobility. Contact your National Agency.

NOT POSSIBLE

- ✗ You may not, under any circumstances, transfer funds for mobility from one Partner Country to another.

---

[28] For 2016 and 2017 contracts, the flexibility to transfer funds between incoming and outgoing is currently being implemented. Please check with your National Agency if an amendment is necessary.
[29] http://ec.europa.eu/programmes/erasmus-plus/sites/erasmusplus/files/library/ka107-amendment-agreements_en.pdf

III – After the mobility – Recognition and Reporting

Recognising credit mobility and enhancing quality

Mobility periods must be **recognised by both HEIs** as stipulated in the **inter-institutional agreement and in the Learning Agreement**. The receiving institution provides the sending institution and the student with a **Transcript of Records** (or equivalent document) within a reasonably short period of time (stipulated between the two institutions) after the issuing of the student's results at the receiving institution.

Upon successful completion of the set of educational components included in the Learning Agreement and confirmed by the Transcript of Records sent by the receiving institution and made available to the student, **the sending institution should fully recognise the agreed number of credits**. It must then transfer them into the student's programme and use them to satisfy the qualification requirements. The sending institution should specify clearly how the educational components taken abroad have been integrated into the home degree programme (when applicable, grades are converted).

In case the students have not completed them successfully at the receiving institution, **institutional procedures should be defined for assessment of educational components**. Such procedures should be communicated to students before the beginning of the mobility.

Another important document used in the European Higher Education Area is the **Diploma Supplement.** This document is designed to provide graduates with a transparent record of their achievements. Therefore, the educational components successfully completed abroad will be attached to the Diploma Supplement with their original titles (and their translation into the language(s) in which the Diploma Supplement is issued), the indication of the institution where they have been taken, and the credits and grades awarded.

Experience has shown that **these good practices facilitate the management of credit mobility and recognition**. Specific institutional rules should be developed to deal with the recognition of other learning experiences, to allow for credit accumulation and transfer through various types of mobility (including for 'free movers'), work experience, virtual learning, prior and informal learning.

The institution should clearly define responsibilities for implementing and monitoring credit mobility and ensure that application procedures and selection criteria for credit mobility are transparent and fair, and that an appeal mechanism is in place. A staff member should be appointed in each department or subject area and formally authorised to discuss the programme of study abroad with the student and to approve and sign the Learning Agreement on behalf of the sending institution, before the start of the mobility period and the Transcript of Records after the mobility period. Individuals should not be asked to negotiate academic recognition with staff members who are not authorised to do so or with a committee, before or after their study abroad period, neither should the student be asked to sit for any other examinations or have to do extra work after having returned.

Integration of credit mobility into programmes

Structuring credit mobility in the curricula facilitates recognition. Institutions can:
- identify the semester or year when a period of study abroad would best fit into the programme (mobility window);
- schedule in that semester/year the educational components with learning outcomes that can be easily achieved abroad (e.g. international or comparative courses, supplementary/ elective courses, preparation of dissertation, language courses, work placements);
- identify partner institutions, where compatible/complementary learning outcomes could be achieved.

Grade distribution

European educational systems have developed **different national grading scales** and **different ways of using them** within the same country. While it is essential to acknowledge these differences, it is also important to make them transparent within the European Higher Education Area, so that grades awarded in all countries, subject areas or institutions can be properly understood and correctly compared.

Mobile students have the right to fair treatment and to transparency of their grades when credits are transferred from one institution to another. Transparency of performance levels is particularly important for graduates applying for a job in their own or in another country.

To ensure transparent and coherent information on the performance of the individual student, each HEI should provide **a statistical distribution table of the passing grades** awarded in the programme or field of study attended by the student (grade distribution table) showing how the grading scale is actually used in that programme.

Even in cases when transferring the grades is not necessary in the local academic tradition of receiving institutions, **calculating a grade distribution table will facilitate fair treatment** of the incoming students on their return to the sending institution. It should be noted that it is also good practice to **provide internal boards of examiners with detailed statistical data on examination grading** in order to make the process more transparent and indicate any disparities which may indicate issues for further consideration.

Partners in joint degree programmes should agree in advance within their consortium how they will deal with grading and transfer of grades.

Grade distribution tables have to be developed in a standardised format for reference groups of students enrolled in degree programmes belonging to the same field of studies. Such groups should be of reliable size in terms of number of students and number of years considered.

Calculating the grade distribution tables is a task that will be undertaken at **centralised level in many institutions**. The production of distribution tables should not cause undue difficulties in institutions as the required data are generally available in institutional information systems and the calculation of percentages is easily done with simple software. It only requires the following:

1. **Identify the reference groups within your institution** by using objective and transparent criteria which should be attached to the grade distribution tables produced. In the absence of methods based on comparable learning outcomes, it is recommended to use the ISCED-F classification which offers a standardised and hierarchical classification of fields of study.

2. **Calculate the absolute number of passing grades awarded to each reference group identified in at least the last two years**. Remember that information on success rates may be provided in general terms but not in this calculation.

3. **Calculate the grade distribution in terms of percentages of the passing grades awarded to the reference group and develop cumulative percentage**s. As a result, there will be a grade distribution table with percentages and cumulative percentages for each reference group identified.

The following is an illustrative example of a **grading table**:

Grades used in institution (from highest to lowest passing grade)	Number of passing grades awarded to the reference group	Percentage of each grade with respect to the total passing grades awarded	Cumulative percentage of passing grades awarded
10	50	5%	5%
9	100	10%	15%
8	350	35%	50%
7	300	30%	80%
6	200	20%	100%
Total	*1,000*	*100%*	

When included in a student's Transcript of Records and Diploma Supplement, **the table facilitates the interpretation of each grade** awarded and will not require any further calculation. The on-going **European Grade Conversion System project** (EGRACONS[30]) is developing examples for the visual presentation of a grading table.

Grade conversion

When institutions decide to transfer their mobile students' grades, the academic responsible for credit transfer should compare the grade distribution table from his/her reference group with the one developed by the other institution for the parallel reference group. **The position of each grade within the two tables can be compared and**, on the basis of this comparison, **individual grades are converted**. Typically, the percentage ranges of the grades overlap. The objective of the exercise is transparency. Therefore, the receiving institution should decide in advance whether they will take the minimum, average or maximum comparable grade.

The participant report

At the end of the period abroad, **all mobile students and staff will be required to submit a final report**. Students will receive the survey by email one month before the end of their mobility period, and submission of the report will trigger the payment of the final grant instalment to the participant. Staff will be expected to complete the survey at the end of their mobility.

As mentioned above, **a further complementary survey specifically on recognition** will be sent to the student after the mobility period to assess the quality of the recognition provided.

The final beneficiary report

At the end of the project, the beneficiary will submit their **final report** to their National Agency. This should include a short description of the project, highlighting the successes and shortcomings in the project implementation. A **budget section** will provide a detailed overview of the budget usage during the project. This and other parts of the report will be prefilled with information from Mobility Tool+, which is why it is crucially important that the information in Mobility Tool+ is accurate and up-to-date. The beneficiary should ensure that all sections are complete before submitting and that all required annexes are attached.
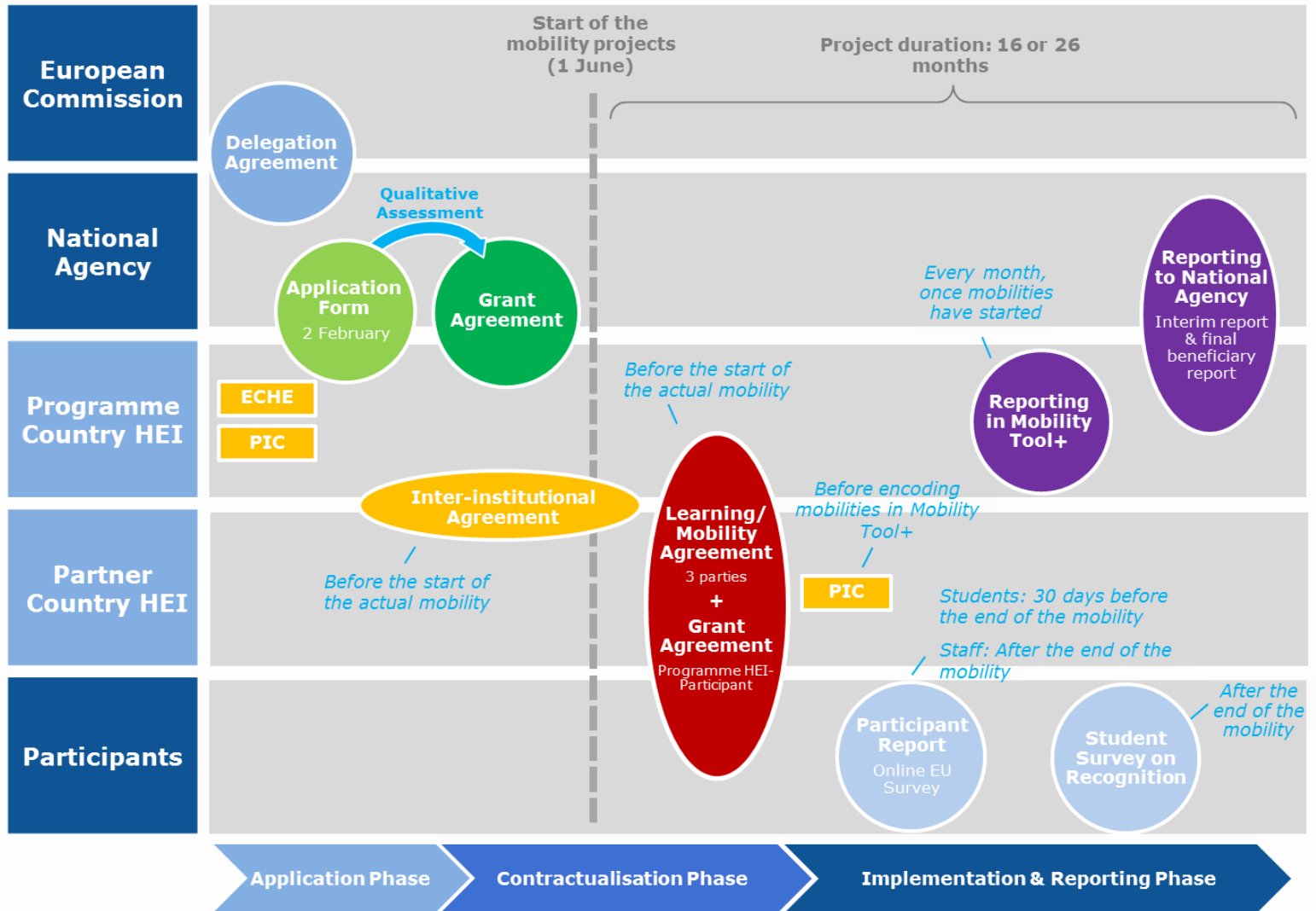
---

30 http://egracons.eu/

The final report will be assessed on the basis of **quality criteria** and scored out of a total of 100 points. If the final report scores below 50 points, the NA may reduce the final grant amount for organisational support on the basis of poor, partial or late implementation of the project even if all activities reported were eligible and actually took place.

The final report will be assessed in conjunction with the participant reports, using a common set of quality criteria focusing on:

- The extent to which the action was implemented in line with the grant agreement.
- The extent to which the action was implemented in respect of the quality and compliance requirements set out in the Erasmus Charter for Higher Education and in their applicable inter-institutional agreement(s).
- The extent to which the grant amounts due to the participants were transferred to them in accordance with the contractual provisions set out in the agreement between the beneficiary and the participant following the template provided in Annex IV of the Agreement.

Project timeline

Start of the mobility projects (1 June)

Project duration: 16 or 26 months

European Commission

Delegation Agreement

National Agency

Qualitative Assessment

Application Form
2 February

Grant Agreement

Reporting to National Agency
Interim report & final beneficiary report

Programme Country HEI

ECHE

PIC

Before the start of the actual mobility

Every month, once mobilities have started

Reporting in Mobility Tool+

Partner Country HEI

Inter-institutional Agreement

Before the start of the actual mobility

Learning/ Mobility Agreement
3 parties
+
Grant Agreement
Programme HEI-Participant

Before encoding mobilities in Mobility Tool+

PIC

Students: 30 days before the end of the mobility

Staff: After the end of the mobility

Participants

Participant Report
Online EU Survey

Student Survey on Recognition

After the end of the mobility

Application Phase ▶ Contractualisation Phase ▶ Implementation & Reporting Phase

Useful resources

Erasmus+ Homepage:
http://ec.europa.eu/programmes/erasmus-plus/index_en.htm
Erasmus+ Programme Guide:
http://ec.europa.eu/programmes/erasmus-plus/discover/guide/index_en.htm
Erasmus+ supporting document repository:
http://ec.europa.eu/programmes/erasmus-plus/discover/guide/documents-applicants_en.htm
FAQs for HEIs:
http://ec.europa.eu/education/opportunities/international-cooperation/documents/mobility-faqs_en.pdf
FAQs for Students & Staff:
http://ec.europa.eu/education/opportunities/higher-education/doc/students-questions-answers_en.pdf
FAQs on the Inter-institutional Agreement:
http://ec.europa.eu/education/opportunities/higher-education/doc/iia-faq_en.pdf
Erasmus Charter for Higher Education:
http://ec.europa.eu/education/opportunities/higher-education/doc/he-charter_en.pdf
Erasmus Charter for Higher Education 2014-2020- Annotated Guidelines
https://eacea.ec.europa.eu/sites/eacea-site/files/annotated_eche_guidelines_2016.pdf
ECHE Monitoring Guide for Erasmus+ National Agencies
https://ec.europa.eu/programmes/erasmus-plus/sites/erasmusplus/files/library/eche-monitoring-guide_en.pdf
Erasmus+ Student Charter:
http://ec.europa.eu/education/opportunities/higher-education/doc/charter_en.pdf
Distance Calculator:
http://ec.europa.eu/programmes/erasmus-plus/resources_en#tab-1-4
ECTS User's Guide:
http://ec.europa.eu/education/library/publications/2015/ects-users-guide_en.pdf
Egracons European Grade Conversion System:
http://egracons.eu/
EU Partner search tool:
http://eupartnersearch.com/Default.aspx

Contact

National Agencies in the Programme Countries:
https://ec.europa.eu/programmes/erasmus-plus/contact_en

National Erasmus+ Offices in 27 Partner Countries:
https://eacea.ec.europa.eu/erasmus-plus/contacts/national-erasmus-plus-offices_en

If your institution is located in a Partner Country where there is no National Erasmus+ Office, you should contact your partner in the Programme Country for information.