

Erasmus+

Erasmus Mundus
Joint Masters (EMJM)

Implementation Rules

Kick-off meeting
21st of November 2024

European Education and Culture Executive Agency





AGENDA

- Structure of the Grant Agreement
- Student Selection Requirements
- EMJM Programme Requirements & Budget Implementation





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Terms & Conditions of the Grant Agreement

Grant Agreement

PREAMBLE

DATASHEET

CHAPTER 1 GENERAL

CHAPTER 2 ACTION

CHAPTER 3 GRANT

CHAPTER 4 GRANT IMPLEMENTATION

CHAPTER 5 CONSEQUENCES OF NON-COMPLIANCE

CHAPTER 6 FINAL PROVISIONS

Annotated Model Grant Agreement GoFund WIKI



Superiority Principle

Art.37 Interpretation of the Agreement



Data Sheet > over the rest of Terms and Conditions



Annex 5 > over the Terms and Conditions



Terms and Conditions > over the Annexes, other than Annex 5



Annex 2 > over Annex 1



Data Sheet Key Data

1

GENERAL DATA

(e.g. Project number, name, type of action, start and end date and duration)

4

REPORTING, PAYMENT & RECOVERIES

(e.g. Continuous and periodic reporting, payments/recoveries, bank account, etc.)

2

PARTICIPANT

(e.g. Coordinator, Beneficiaries, Associated partners)

5

NON-COMPLIANCE

Consequences of noncompliance, applicable law & dispute settlement forum 3

GRANT

(e.g. Action grant, budget categories, budget flexibility – with conditions) Unit Contribution, Lump sum

6

OTHERS

(e.g. Annex 5, record-keeping, audits and reviews, etc.); 5 y (EMJM) or 3 y (EMDM)



Chapters 1 to 6 Key Articles

ARTICLE 2

DEFINITIONS

ARTICLE 6

ELIGIBLE AND INELIGIBLE CONTRIBUTIONS

ARTICLE 11

PROPER IMPLEMENTATION OF THE ACTION

ARTICLE 17

COMMUNICATION, DISSEMINATION AND VISIBILITY

ARTICLE 20

RECORD KEEPING

ARTICLE 21

REPORTING

ARTICLE 22

PAYMENTS AND RECOVERIES — CALCULATION OF AMOUNTS DUE

ARTICLE 35

FORCE MAJEURE

ARTICLE 36

COMMUNICATION BETWEEN THE PARTIES

ARTICLE 37

INTERPRETATION OF THE AGREEMENT

ARTICLE 38

CALCULATION OF PERIODS AND DEADLINES

ARTICLE 39

AMENDMENTS



Amendments (Article 39)

Practical information and manuals



<u>How to launch an amendment - IT How To - Funding Tenders Opportunities (europa.eu)</u>

Table of contents

- Step 1: The Coordinator logs in to the Funding & Tenders Portal.
- Step 2: The Coordinator launches the amendment request, prepares all data and sends to the EU for review
 - o a. Launching a new interaction with the Service.
 - o b. Preparing the amendment data.
 - o c. Locking the amendment request for review
 - o d. Sending the amendment request for review by the EU
 - Option: cancel amendment
- Step 2: The EU Services review the amendment request (mandatory)
- Step 3: The Project Legal Signatory signs and submits the amendment request to the EU Services after the EU review
 - Option: withdraw amendment
- Step 4: The EU Services assess the amendment.
- Step 5: The EU Services accept (countersign the amendment) or reject (make available a rejection letter).



Amendments (Article 39) Useful documents and guides



Online Manual: Detailed explanation for the process and actions to be completed in narrative way

Amendments - Online Manual - Funding Tenders Opportunities (europa.eu)

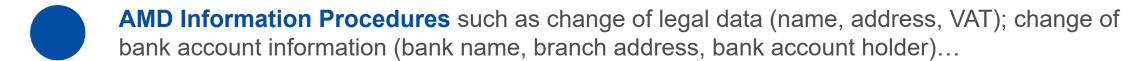


Amendment Guide: lists the amendment types (AT-clauses) and shows mandatory combinations **amendment-guide en.pdf (europa.eu)**



Changes without Amendment & Practicalities

Certain data changes which do not require a formal amendment:





Some practicalities:

- Request to be submitted before the end of the action & sufficiently in advance
- An amendment proposed by a consortium **enters into force** on the day the Granting Authority signs it
 - It takes effect (i.e. the changes to the Grant Agreement start to apply) either: on a specific date specified in the amendment or on the date of entry into force (last signature = signature by the EU)

Audit

WHEN?

Up to 5Y after the end of project implementation

ARTICLE 25 – CHECKS, REVIEWS, AUDITS AND INVESTIGATIONS — EXTENSION OF FINDINGS

WHO?

Agency/Commission staff, **external auditors**, European Court of Auditors



HOW?

Checking supporting documentation

WHERE?

In full partners' premises

WHY?
For reasons of accountability





Costs Justification & Documentation

UNIT CONTRIBUTIONS (G.A. Article 6, Eligible and ineligible contributions; Article 20 – record keeping)

Units declared must:

- be actually used or produced by the beneficiary in the period set out in Article 4 (with the exception of units relating to the submission of the final periodic report, which may be used or produced afterwards; see Article 21)
- be necessary for the implementation of the action

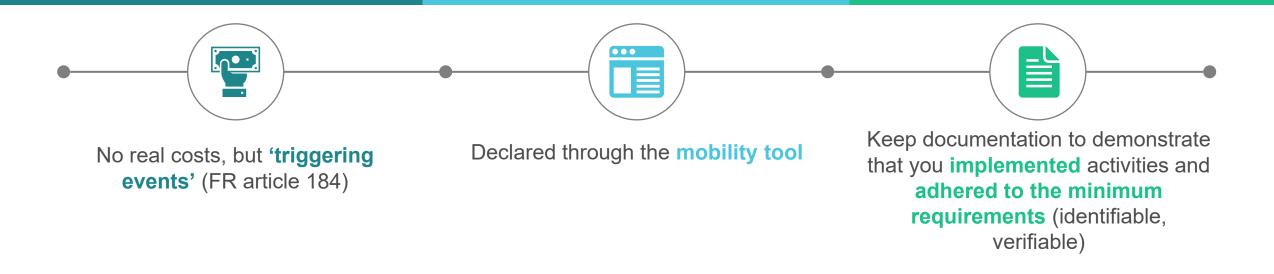
and (b) the number of units must be **identifiable** and **verifiable**, in particular supported by records and documentation (see Article 20).

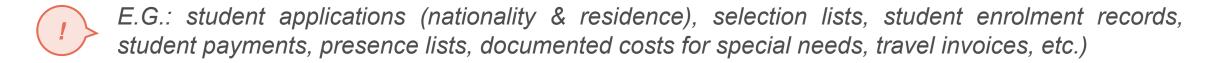
Beneficiaries

- must keep adequate records and supporting documents to prove the number of units declared;
- beneficiaries do not need to keep specific records on the actual costs incurred.'



Costs Justification & Documentation









AGENDA

- **01** Structure of the Grant Agreement
- **02** Student Selection Requirements
- EMJM Programme Requirements& Budget Implementation



Student Selection Grant Agreement, Annex 5



« **open, transparent, impartial** and equitable selection procedure, which ensures that the best students are selected »

Through a **project website**, where all information on selection and application procedures is provided to applicants



« For scholarships, the beneficiaries must moreover: advertise and publish the scholarships internationally, including on the websites requested by the granting authority »

Leading to a **selection list**, enrolled students to be encoded as a basis for your budget calculation



Erasmus Mundus Catalogue

https://ec.europa.eu/erasmus-mundus

Erasmus Mundus Catalogue



Erasmus Mundus Joint Masters

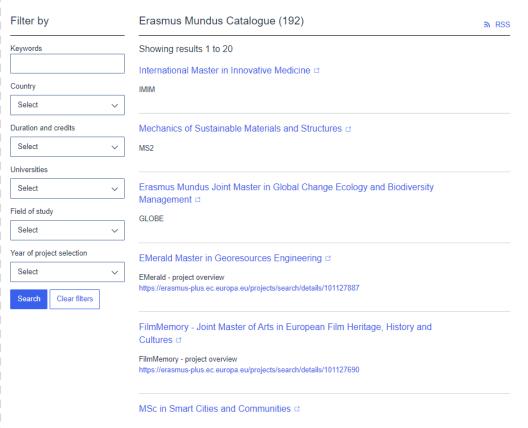
Erasmus Mundus Joint Masters are delivered by multiple higher education institutions and run across various countries. They are distinguished by their academic excellence and by their high level of integration. Students at master's level from all over the world can apply.

In addition, scholarships are available for the best students.

Read more to find out if an EMJM is right for you.

The Erasmus Mundus Catalogue is updated yearly and lists the Master's programmes that are currently supported by the European Union. Most offer Erasmus Mundus scholarships: some do not, being at the end of their funding period or having been temporarily allowed to use the Erasmus Mundus name after the end of their funding period.

Most consortia require applications to be submitted between October and January for courses starting the following academic year. Interested students should click on the url of the master and directly contact the consortium for information on courses, application procedures and scholarships availability.





Website – Information...

Grant Agreement, Article 17 - Communication, dissemination and visibility

Essential elements for EMJM websites

- The website respects the following parameters:
- 1.1. Is present in the Erasmus Mundus Catalogue
- 1.2. Is dedicated to the study programme
- 1.3. In English (at least)
- 1.4. Is aligned with the corresponding grant agreement: terms, wording, external links
- 1.5. Project coordinator and full partners are listed
- 1.6. A contact is provided
- 2. The website explains the academic principles of the programme:
- 2.1. The main characteristics of the master
- 2.2. The study mobility requirements
- 2.3. The ECTS scheme
- 2.4. The final degree/s awarded (joint, double, multiple) with explanation and reference to degree name and status within national education system
- 2.5. The prospects after graduation: eligibility for a PhD and access to the job market
- 2.6. It also provides the template of the Student Agreement
- 3. The website describes what is provided to students:
- 3.1. The financial conditions of the scholarship in line with the Grant agreement (monthly allowance, insurance, travel costs)
- 3.2. The available support for students with special needs
- 4. The website details eligibility and application procedure:
- 4.1. Explains student selection criteria and procedure, including opportunities for scholarships
- 4.2. Reminds students that those who have already benefitted from an Erasmus Mundus Joint Master (EMJM) scholarship are not eligible to apply for an additional scholarship
- 4.3. Indicates when and how to apply
- 4.4. Describes the appeal procedure
- The website adopts the correct EU logo and disclaimer, in accordance with the <u>visual</u> identity rules
- 6. The information regarding the collection and processing of personal data by the Agency is provided as follows: "The European Education and Culture Executive Agency (EACEA), in the context of managing the Erasmus Mundus Joint Masters, collects and processes the personal data of some of the candidates. In particular, certain data of the scholarship holders and non-scholarship holders is shared with the Agency and treated according to this privacy statement."

Checklist from the Agency

- To help you comply with the minimum requirements
- To share recommendations from past experience



... AND communication

Highly recommended to attract students:

- Design a modern and appealing website
- Not only a patchwork of informative items



Guide on **How to communicate your project**



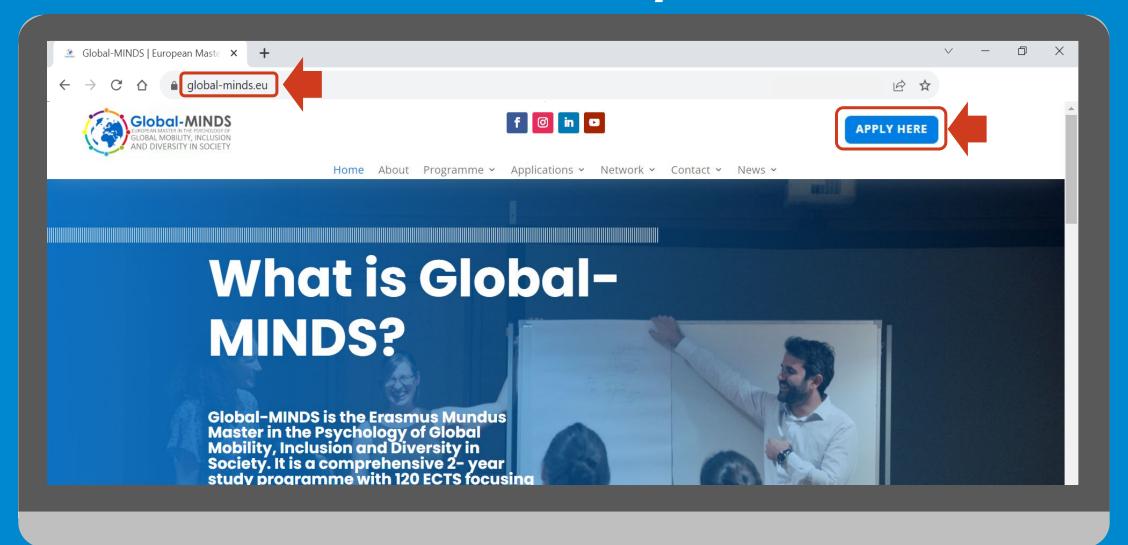
How to communicate YOUR PROJECT



#CommsJourney

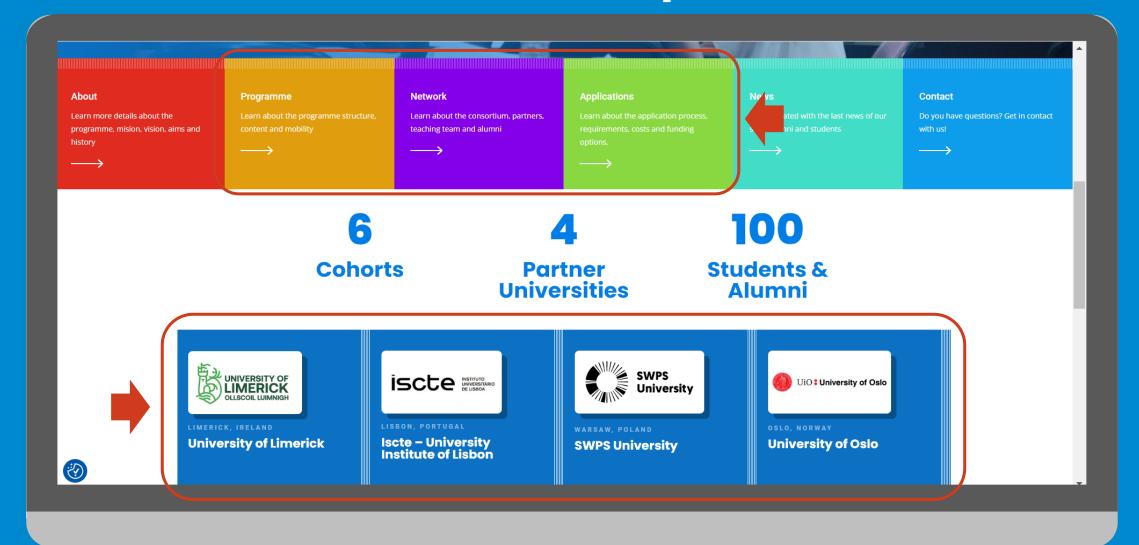


Website – Good practices





Website - Good practices





EU visual identity



Co-funded by the European Union

Art. 17.2 of your Grant Agreement

<u>European flag emblem and multilingual disclaimer (europa.eu)</u>



EU visual identity Do's...







EU visual identity

Don'ts...



Co-funded by the EU

the European Union, aiming to enhance quality in higher education through scholarships and academic co-operation between the EU and the rest of the world.





Admission Portal & Admission Requirements Erasmus+ Programme Guide & Grant Agreement, Annex 5

identified as the rate corresponding to or immediately lower than the estimated expenses. This unit cost is a contribution and is not intended to fully cover the actual costs.

NB: costs below the lowest rate (i.e., less than EUR 3 000) will not be eligible for additional support and will have to be covered by the contribution to the institutional costs of the EMIM or by other funding sources of the beneficiary institutions.

- + Entry requirements
- + Required documents
- + Guidance notes for using the online application
- + English language requirements
- + Scholarships
- + Application deadlines



FREE OF CHARGE (!)

GA annex 5: [the beneficiary shall] "not charge application fees during the selection process"



Include an Appeal procedure



Eligible students are those who have not obtained a prior EMJM scholarship (!)



Admission Portal & Admission Requirements *Good practices*



What do you offer as an Erasmus Mundus Joint Master:

academic content • participation fees and scholarships • study tracks • internships • thesis • career opportunities • evaluation methods for the graduation • Important: contact details of the staff who will be able to answer questions from the students and provide clarifications



Practical information:

student life in the hosting institutions • student testimonies (especially after the first intake(s) • FAQs • handbooks • Important: information about visa and residence permit requirements



Selection process Recommended



Keeping your student application call open for around **3 months**

Continuity in the recruitment process and in the number of scholarships awarded (partner / programme country students) over the years, but:

- this is your internal decision, and
- no authorisation/amendment needed if you deviate from your application.



Award of Scholarships Main requirements when drawing the ranking list

1

The scholarship is awarded for **full-time enrolment**, and will cover the entire duration of the Master programme (i.e. 12, 18, 24 months) (but institutional costs that occur during the eligibility period for non-scholarship holders can be claimed for students who will graduate outside the eligibility period)

2

A reduced duration of the scholarship is only possible if **recognition of prior learning** (of min. 1 year)

3

Max 10% of (regular) scholarships awarded to students of the same nationality



Selection List & Scholarships Allocation

NAME	SCORE	NATIONALITY	RANK
John	87	ES	1
Paula	86	US	2
Emma	85	ES	3
Ludo	82	IT	4
Geert	81.5	BE	5
Ali	80	TN	6
Sebastian	79	SI	7
Sarah	72	IN	8
Claudia	71	IT	9
X	69	BE	NA
Υ	54	ES	NA
Z	31	ES	NA

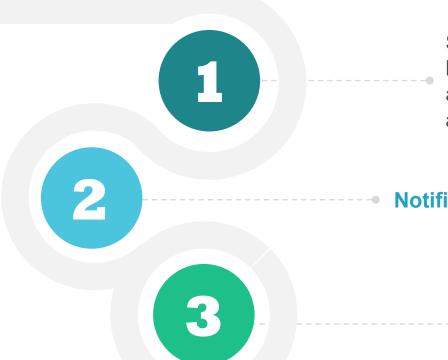
One selection list, one rank. Excellence!

Consortium decides where the cut-off is for scholarships, for non-scholarship holders and reserve list

Mind the targeted regions from the first intake on



Student Selection Steps to Remember



Student selection uploaded in the Mobility Tool annually by **30**th **April** at the latest (**MILESTONES**!) No authorisation by EACEA needed. Do not wait for approval!

Notification of results to all applicant

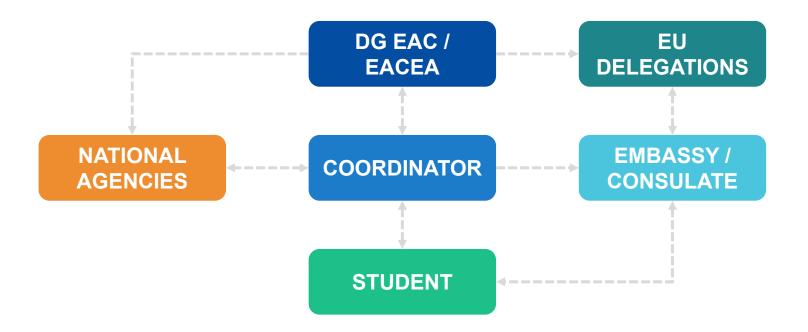
Assist selected students in practical arrangements, including visa procedures and insurance

Good practice – Welcoming Guide:

Studies and mobility organisation • Guidance and support for visa and residence permits • Accommodation • Insurance • Cost of life • Students' services at the University • Language courses • Academic tutoring • Academic preparatory material • etc.



Visa Requirements & Actors



VISA DIRECTIVE of 11/05/2016

Entry of third-country nationals for research, studies and training

https://eur-lex.europa.eu/eli/dir/2016/801/oj

Very good practice! acceptance letter to students:



European Commission

- ✓ Course information
- ✓ Starting date and duration of the mobility
- ✓ Mobility scheme (at least 1st host institution, ideally the entire mobility track of the student)
- ✓ Grant amount (incl. insurance coverage)
- ✓ Logistical services and contact information
- ✓ References to EMA
- ✓ Deadline for confirming the acceptance
- ✓ Guidance on the correct type of student visa to apply for

Student agreement Grant Agreement, Annex 5



After enrolment sign the Student Agreement

- It will contain the academic, administrative and financial aspects of the joint programme
- Arrangements for a complaint procedure
- Erasmus Mundus Students and Alumni Association
- Scholarship arrangements & eligibility conditions



Insurance Requirement Grant Agreement, Annex 5

For all students enrolled! Beneficiaries need to:



Ensure that all students benefit from an insurance scheme; and



Cover the costs.

GRANT AGREEMENT

"The scheme must take effect from when the students start their journey to participate in the master course (maximum two months before the start of the master course) and until at least two months after the end of the studies (end of the course, unless the student leaves earlier). The cover must include: (...)"



If you cannot or do not want to conclude the insurance *on behalf* of students, you should at least verify whether the students did and reimburse the related cost.



Note that you are free to set the tuition fees for non-scholarship holders.





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Programme Requirements (a)

As written in Annex 5 of your Grant Agreement, as well as in the **Programme Guide**:

DEGREE REQUIREMENT (JOINT, MULTIPLE, COMBINATION)

"All full partner HEIs (from EU Member States or third countries associated to the Programme or third countries not associated to the Programme) must be Master level degree-awarding institutions and award either a joint or a multiple degree attesting the successful completion of the EMJM programme to the students fulfilling the degree requirements"

EXCHANGE OF STAFF & VISITING SCHOLARS

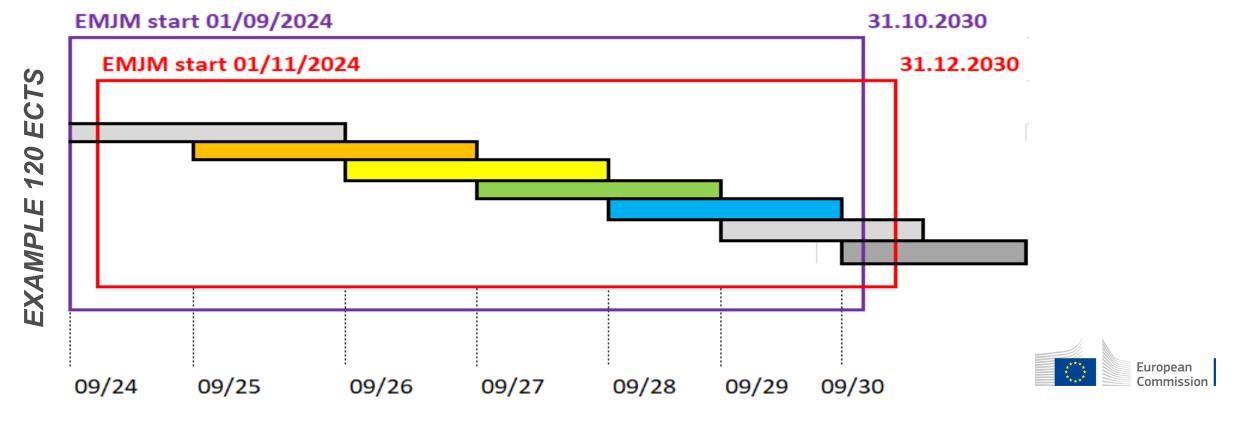
"Promote the exchange of staff and invited scholars to contribute to teaching, training, research and administrative activities"



Programme Requirements (b)

DURATION

"Organise at least four editions of the Master programme", each lasting 1 to 2 academic years (60, 90, or 120 ECTS credits



Mobility Requirements

Compulsory physical mobility for all enrolled students:

• 2 study periods in 2 countries (min. 1 EU MS or country associated to Programme), each min. 30 ECTS*; both different from the country of residence of the student at enrolment stage.

• The country of residence is defined at enrolment stage ("stable residence in the months before enrolment").

Compulsory mobility periods cannot be replaced by virtual mobility (but other periods can).

All study periods must take place in **full partner** HEIs, or under their direct supervision.



Examples

TRACK 1

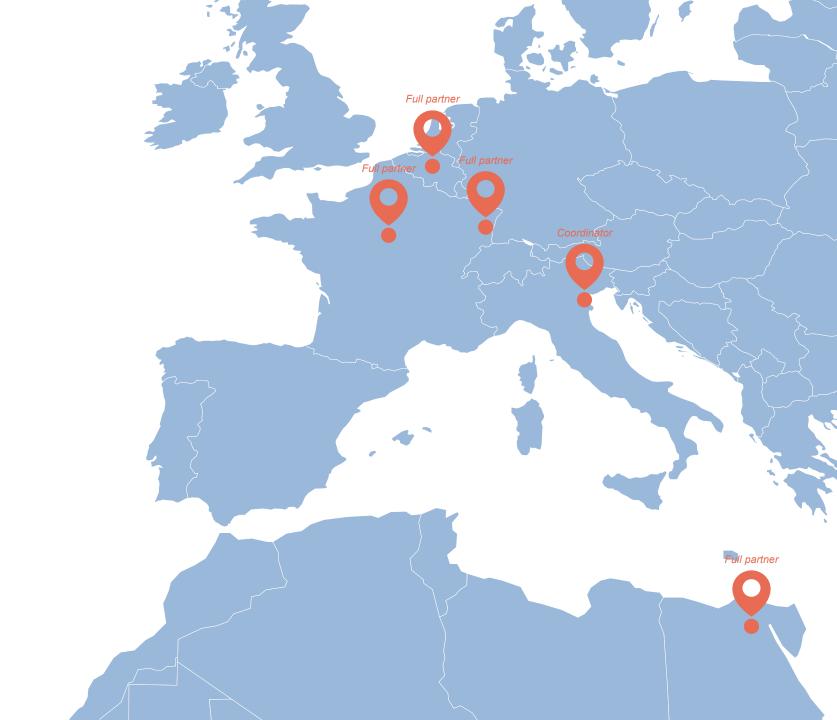
- **BE** (30 ECTS)
- **EG** (30 ECTS)
- IT (<u>remotely</u>, 60 ECTS)

Eligible track, <u>unless</u> student is resident in Belgium or Egypt

TRACK 2

- FR (30 ECTS)
- IT (30 ECTS)
- US (associate partner under supervision of BE, 60 ECTS)

Eligible track for <u>all</u> students!



Consortium Agreement

You are required to have a signed **Consortium Agreement** by the start of your first edition as stated in the GA, annex 5: "before the enrolment of the first students in the master course" (GAP: milestone at month 6)

Internal document, not reviewed by EACEA. Thus, a milestone and not a deliverable to be uploaded and reviewed



EMJM Budget Breakdown Grant Agreement, Annex 2

(ACTIVITIES, WORK PACKAGES, TIMING AND SUBCONTRACTING)

EMJM - ERASMUS-EDU-2024-PEX-EMJM-MOB

	REQUESTED GRANT AMOUNT Estimated eligible unit contributions (per budget category)							
	A. Contributions for scholarships			B. Institutional contributions			C. Contributions for special needs	Total
	Heading 2	Heading 6 IPA	Heading 6 NDICI	Heading 2	Heading 6 IPA	Heading 6 NDICI		
Forms of funding	Unit contribution	Unit contribution	Unit contribution	Unit contribution	Unit contribution	Unit contribution	Unit contribution	e = a+b+c
	a			b			с	e = a+o+c
1 - Coordinator	2 016 000	67 200	604 800	1 800 000	36 000	324 000	120 000	4 968 000
Total consortium	2 016 000	67 200	604 800	1 800 000	36 000	324 000	120 000	4 968 000



Calculated on the basis of the Mobility Tool in FTOP



Based on unit costs



Budget Based on 3 unit costs

UNIT COSTS: <GA: ARTICLE 6 — ELIGIBLE AND INELIGIBLE CONTRIBUTIONS





Institutional costs & tuition fees

"Projects cannot charge tuition fees or other mandatory costs related to student participation in the course to Erasmus Mundus scholarship holders."





Pro-rata Payment of Unit Costs Example

Student arrival: 12/09/2024; Student drops out: 25/12/2024



Foresee corrective payments at the end when necessary and inform your students in the STUDENT AGREEMENT (!)



Student Mobility Starting & End Date



Important to determine the grant.



Declaration through mobility tool (tab): presentation tomorrow.



Please keep documentation (e.g. travel documentation) proving the student's presence on the starting date introduced in your tool, and the relation to your programme (study activities). If no travel documentation is available (such as in case of blended learning) the 'starting date' will need to be documented via an (online) attendance confirmation of the respective student in the programme activities.



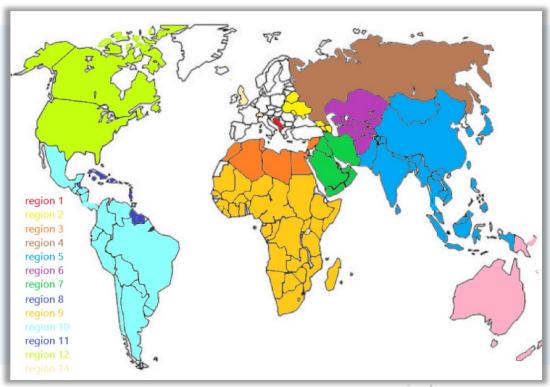
In any case, the maximum duration of the scholarship (12, 18 or 24 months) cannot be exceeded and only costs incurred within the project's eligibility period will be accepted



Targeted Regions of the World Heading 6

Check carefully the list of countries per region in the <u>Programme Guide</u>, p.32-34. **Nationality** is the basis, not 'residence'.

Western Balkans (Region 1)	Albania, Bosnia and Herzegovina, Kosovo ²¹ , Montenegro				
Neighbourhood East (Region 2)	Armenia, Azerbaijan, Belarus, Georgia, Moldova, Territory of Ukraine as recognised by international law				
South-Mediterranean countries (Region 3) ²²	Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine ²³ , Syria, Tunisia				
Russian Federation (Region 4)	Territory of Russia as recognised by international law				
Region 5 Asia ²⁴	Bangladesh, Bhutan, Cambodia, China, DPR Korea, India, Indonesia, Laos, Malaysia, Maldives, Mongolia, Myanmar, Nepal, Pakistan, Philippines, Sri Lanka, Thailand and Vietnam High income countries: Brunei, Hong Kong, Japan, Korea, Macao, Singapore and Taiwan				
Region 6 Central Asia ²⁵	Afghanistan, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan				
Region 7 Middle East	Iran, Iraq, Yemen High income countries: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates				
Region 8 Pacific ²⁶	Cook Islands, Fiji, Kiribati, Marshall Islands, Micronesia, Nauru, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Timor-Leste, Tonga, Tuvalu, Vanuatu High income countries: Australia, New Zealand				
Region 9 Sub-Saharan Africa ^{27 28}	Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cabo Verde, Central African Republic, Chad, Comoros, Congo, Congo - Democratic Republic of the, Côte d'Ivoire, Djibouti, Equatorial Guinea, Eritrea, Eswatini, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Rwanda, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Tanzania, Togo, Uganda, Zambia, Zimbabwe				
Region 10 Latin America	Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay and Venezuela				
Region 11 Caribbean ²⁹	Antigua & Barbuda, Bahamas, Barbados, Belize, Cuba, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St Kitts and Nevis, St Lucia, St Vincent & Grenadines, Suriname and Trinidad & Tobago				
Region 12 US and Canada	United States of America, Canada				
Region 13	Andorra, Monaco, San Marino, Vatican City State				
Region 14	Faroe Islands, Switzerland, United Kingdom				





Targeted Regions of the World Heading 6

"GEOGRAPHICAL TARGETS AND INDICATIVE BUDGET SHARE" (if 2+18)

Region 9, (Sub-Saharan Africa) 31%

Region 10, (Latin America) 24%

Region 5, (Asia) 23%

Region 6, (Central Asia) 9%

Region 3 (Neighbourhood South) 8%

Region 7 (Middle East) 3%

Region 8 (Pacific) or Region 11 (Caribbean) each 1%

Region 1 (Western Balkans)

5 to 6 full scholarships (from different countries) No country may access more than 8% of funding foreseen for the Region

4 to 5 full scholarships (max 30% (1) from Brazil and Mexico)

4 to 5 full scholarships ('priority to least developed countries')

1-2 full scholarships ('priority to least developed countries')

1-2 full scholarships

0 or 1 full scholarships ('priority to least developed countries')

0 or 1 full scholarships

2 full scholarships

NDICI

(up to 18)

IPA (up to 2)



Scholarship Reallocations after Drop-out



The budget figures are based on a maximum contribution, they do not apply a 'maximum number of people'. Therefore, reallocations are possible (e.g. following drop-outs, prorata payments etc.)



No 'justification' is needed for no-show, late arrivals, replacements, etc.



Monitor your project budget closely (do not commit to more costs than foreseen, the max. grant will not be raised and EACEA will not calculate this before the end of your project!)





Documentation to keep

Units declared must:

- be actually used or produced by the beneficiary in the period set out in Article 4 (with the exception of units relating to the submission of the final periodic report, which may be used or produced afterwards; see Article 21)
- be necessary for the implementation of the action

and (b) the number of units must be **identifiable** and **verifiable**, in particular supported by records and documentation (see Article 20).

To keep:

- Enrolment records, scholarship payments
- Signed student agreement, insurance coverage
- Application package of students (residence for mobility requirement, nationality for the 10% rule)
- As needed: (online) attendance records, presence lists, etc. (start and end date)



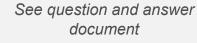
Contributions for Special Needs

UNITS

- number of special needs units (per enrolled student, with or without scholarship).
- The pre-defined special needs units are: EUR 3,000; EUR 4,500; EUR 6,000; EUR 9,500; EUR 13,000; EUR 18,500; EUR 27,500; EUR 35,500; EUR 47,500; and EUR 60,000.
- "Requested special needs unit multiplied by (1/number of months)".
- NO prior authorisation needed from EACEA to apply the unit costs.

SUPPORTING DOCUMENTS (SD)

- to be kept: SD that the cost were needed and that the student's participation in the action would
 not be possible without the special needs items or services, and not already covered; a student
 declaration with an estimation of costs, communication to the students concerned on the
 availability of services and funds);
- Certification by a competent national authority of the long-term impairment of the concerned student





Communication with EACEA



Project contacts: through **PORTAL MESSAGING FACILITIES** please!



Bilateral meetings with your project officer (to be) planned in the coming days / weeks



<u>EACEA-EM-CONSORTIA@ec.europa.eu</u>; PROJECT.OFFICER@ec.europa.eu



Thank you



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