

# **Step by Step: Guidelines for Erasmus+ Mobility Actions <sup>1</sup>**

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Erasmus + programme Key Action 1 (KA1) learning mobility of individuals refers to a credit mobility between Programme countries (KA103), and International credit mobility between Programme and Partner Countries (KA107)

## **ECHE**

### **Institutions must be holders of the Erasmus Charter for Higher Education (ECHE)**

For International Credit Mobility between Programme and Partner countries, the Programme country Higher Education Institution needs to be holder of ECHE and apply on behalf of the mobility partners. It is not relevant to Higher Education at the Partner country.

The Erasmus Charter for Higher Education (ECHE) provides the general quality framework for cooperation activities within Erasmus+. ECHE is a prerequisite for all higher education institutions located in Programme Countries. For higher education institutions located in Partner Countries, ECHE is not required and the quality framework will be established through inter-institutional agreements. However, institutions applying for mobility actions must be established in Programme Country and must be holders of the ECHE.

A call for proposals for award of ECHE is held on annual basis. ECHE is awarded for the full duration of Erasmus+. The received ECHE should be published on the institution's webpage. Please note that holding ECHE will not guarantee funding for mobility actions! Each institution needs to submit a separate grant application for each academic year to its National Agency.

## **IIA**

### **Mobility is carried out in the framework of inter-institutional agreements (IIA)**

Inter-institutional agreements (IIA) can be signed between two or more higher education institutions. By signing an IIA the involved institutions agree to cooperate in the exchange of students and/or staff in the framework of Erasmus+. The IIA can also be signed at a later stage when the actual mobility is confirmed but before the actions take place.

Templates of IIA between Partner countries and Partner-Programme countries are at [http://ec.europa.eu/education/opportunities/higher-education/quality-framework\\_en.htm#inter-institutional\\_agreements](http://ec.europa.eu/education/opportunities/higher-education/quality-framework_en.htm#inter-institutional_agreements)

## **PIC**

### **All HE institutions in both Programme and partner countries need to be registered in the Unique Registration Facility (URF).**

For that:

- Create an **ECAS** (European Commission Authentication System) account
- Log in to the [Participant Portal](#) with the created user

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- Register your organisation in the URF (Unique Registration Facility)
- Upon the completion of registration, you will receive a PIC (Participant Identification Code) which you will be able to use in all Erasmus+ proposals, submissions and negotiations. The PIC is provided at the end of the registration process and can be used for proposal submission after 48 hours.

List of PIC codes of all registered Higher Education Institutions is available [here](#)

Higher education institutions from Partner Countries need a PIC as soon as they have been selected, and in any case before the start of the mobility.

Mobility activities for one academic year start from June 1 and may continue until September 30 the following year.

## STUDENT MOBILITY

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### Regulations

The students must be registered in a higher education institution and enrolled in studies leading to a recognised degree or other recognised tertiary level qualification (up to and including PhD). The first year of studies must be completed at the sending institution (this does not apply to Master or PhD students).

#### Type & length of the exchange

- **Studies<sup>2</sup>** and combined mobility (including traineeship): **3 to 12 months**.
- **Traineeship** (work placement)<sup>3</sup>: **2 to 12 months** (including the traineeship by recent graduates that needs to take place at the latest 12 months after the end of the study period).

#### Cycles

The same student may receive grants for studies or traineeship up to 12 months maximum per each study cycle:

- During the first cycle (Bachelor or equivalent)
- During the second cycle (Master or equivalent)
- During the third cycle as doctoral candidate

The duration of the traineeship by recent graduates counts towards the 12 months maximum of the cycle during which they apply for the traineeship. This means that a student who has been on exchange for 12 months during Master level cannot apply for the traineeship by recent graduates after graduating from the second cycle. Total accumulated duration of Erasmus+ student mobility can be 36 months (12 during the first cycle, 12 during the second cycle and 12 during the third cycle).

### Before the Mobility

#### Step 1

#### **Institutional call for applications**

The IRC (International Relations Coordinator) of the sending institution can organise an annual information event to raise the students' awareness of the exchange possibilities, application process and necessary documentation.

<sup>2</sup> Please consult with your National Agency which partner countries are eligible for mobility activities

<sup>3</sup> Traineeship mobility is not eligible between Programme and Partner countries at least in a.y. 2015-2016 and 2016-2017

## Step 2

### Grant application submitted to the National Agency

The grant application needs to be submitted by the yearly call for proposals to the [National Agency](#) (NA) of the country of the applicant organisation<sup>4</sup>. The application period usually takes place in early March. Deadline for the International Credit Mobility application is early February. Please follow the information given by your NA concerning the annual call for proposals.

## Step 3

### Student mobility application package compiled and sent to the receiving institution

Full application package includes:

1. Student application form for Erasmus+ mobility
2. Audio/video recording or portfolio (see the application requirements of the receiving institution)
3. Transcript of Records from the sending institution: the official record of the ECTS and results the student has obtained so far at the current study level
4. Motivation letter indicating the student's goals and wishes in relation to the study opportunity abroad
5. Curriculum Vitae/Biography (if requested by the receiving institution)

*NB! It is recommended to conclude and sign the Learning Agreement for studies / Learning Agreement for traineeship whereafter the student is accepted by the receiving institution*

### Student application form for Erasmus+ credit mobility

The sending institution can set its internal selection criteria (e.g. based on grade-point average). All applications have to be sent by the IRC of the sending institution to the IRC of the receiving institution. This ensures that the sending institution approves the exchange.

Note that different institutions have different deadlines for incoming exchange applications. Please consult <http://www.aec-music.eu/members/our-members-for-more-information>.

### Learning Agreement for studies / Learning Agreement for traineeship

#### Studies:

- The Learning Agreement for studies (LA) is a document that indicates the precise courses that the student will be studying and needs to be approved by the student, the sending and the receiving institution. This guarantees the sending institution recognises the Erasmus exchange as part of the studies. Therefore the LA form includes an additional table for the recognition plan. The actual LA needs to be finalised before the exchange but does not have to be sent with the application package in order to avoid multiple changes.
- The LA proposal can at the first stage include a list of courses the student wishes to attend. The first draft can be sent to the receiving institution by email for them to add the information such as link to the course catalogue, name of the responsible person, planned dates of the mobility period, etc. It also provides an opportunity for the receiving institution to comment on the proposed study programme and number of credits, and to make suggestions for additional or alternative courses.
- The LA should be signed at the stage when the study plan is satisfactory for all parties. Changes to the already approved LA should be made in exceptional cases only.
- It is recommended to work on the electronic the LA by using google.docs <https://www.google.com/docs/about/> and use digital signatures for signing.

<sup>4</sup> KA1 application for mobility activities can be submitted for the total duration of 16 or 24 months

- For convenience, LA for studies is divided in 3 parts **Before mobility, During mobility, After mobility** and also includes **annex** and **guidelines** how to complete the LA.
- **1 part:** before mobility part includes **information about student, sending and receiving institutions. Table A** of the LA describes proposed mobility programme: course components (subjects/modules), duration of the course (semester/term, academic year), assessment mode (important information for further recognition), and number of credits.
- Sending institution by signing LA confirms that all courses and credits indicated in the Table B will be recognised and counted towards students degree.

### Traineeship:

- The Learning Agreement for traineeship sets out the training programme and activities to be followed as approved by the student, the sending and the receiving institution. This guarantees the sending institution recognises the outcomes of the traineeship. The LA also includes the required information for the Traineeship Certificate that the receiving institution must issue within a maximum of 5 weeks after the successful completion of the traineeship.
- The receiving institution can be an enterprise of any size (small, medium or large) legally acting in any EU or EU Economic Area country. The host organisations may include HEIs, music festivals, concert organizations, cultural organisations, professional associations and also international relations offices of conservatoires or the AEC Office. Enterprises are not requested to hold ECHE and PIC if they are not higher education institutions.

**For convenience, LA for traineeship is divided in 3 parts **Before mobility, During mobility, After mobility** and also includes **annex** and **guidelines** how to complete the LA.**

### Step 4

#### Evaluation process and result of application given to student and IRC

Upon receiving an incoming exchange application the IRC of the receiving institution follows the internal institutional rules in forwarding the application (e.g. to the teacher of the main study/specialisation, head of department or jury etc.).

Information about the result of the application should be sent both to the IRC of the student's (sending) institution and the student.

It is highly recommended to send the application results (also in case of negative results) to the sending institution as early as possible. The timeframe is determined in the IIA (Chapter E) and the institution should set a realistic time period for application processing.

### Step 5

#### Finalisation of the Learning Agreement

Upon confirmation from the receiving institution, the LA needs to be concluded and finalised in cooperation with the student and responsible persons in both sending and receiving institutions.

### Step 6

#### Grant agreement signed by student and home institution<sup>5</sup>

Students may be awarded an Erasmus+ EU grant to help cover the travel and subsistence costs incurred in connection with the study/training period abroad. The amount of the scholarship depends on the country of the receiving institution. The NA of the home institution and the home institution are responsible for setting the exact grant amounts for each of the three country [groups](#)

<sup>5</sup> Referring to mobility between Programme and Partner countries, HE of the Programme Country will be responsible for managing the grants allocated by the National Agency and signing the grant agreement with the mobility participants regardless of incoming or outgoing and manages all the expenses related to the mobility.

(p.43) and for publishing the information on their websites<sup>6</sup>. The same level of grant must be given to all students going to the same group of countries for the same type of mobility. Students carrying out traineeships will receive an additional top-up from the EU grant of an amount between 100 and 200 EUR per month. The exact amount will be determined by NAs and/or higher education institutions. Students from disadvantaged backgrounds may apply for an additional Erasmus grant between 100 and 200 EUR per month. Additional grants are not available for international credit mobility. A grant agreement covering the mobility period will be signed between the student and the sending institution. Different payment schemes are possible (e.g. payment by semesters or by a two-month period). When international credit mobility is organised, HEI in programme country concludes agreements for both outgoing and incoming students. In addition to grant for studies international credit mobility students also receive travel grant.

#### Zero-EU grant student mobility:

Zero-EU grant students are participants in mobility actions who do not receive an EU grant related to travel and subsistence, but otherwise fulfil all student mobility criteria and benefit from all advantages of being Erasmus+ student. Zero-EU grant students may receive a regional, national or other type of grant to contribute to their mobility costs. Their number counts in the statistics for the performance indicator used to allocate the EU budget between the countries.

### **Step 7**

#### **Language assessment/courses<sup>7</sup>**

Starting from 2014, the European Commission will gradually launch a European online linguistic support service that will provide a tool for participants in credit mobility activities to assess their knowledge of the language they will use to study abroad as well as to follow an online language course to improve their competences.

Online language assessment is mandatory for each student both before and after the mobility period if the working language of the institution is English, Dutch, German, French, Italian or Spanish. The sending institution may offer online language courses (2-12 months) for the outgoing student if the student's level is below the recommended level. For other languages the institution can offer courses from Organisational Support (OS) funds.

The sending institution is obliged to guarantee the necessary language preparation for mobility participants.

### **Step 8**

#### **Providing the Erasmus Student Charter to the outgoing students**

Erasmus Student Charter (ESC) is a document setting out the student's rights and obligations regarding the study period abroad.

### **During the Mobility**

### **Step 9**

#### **Exceptional changes to the proposed mobility programme (Learning Agreement)**

Please note that the time for processing amendments is limited to four to seven weeks. The use of digital signatures is advised. When advising the student, please stress the importance of his/her own responsibility in case of changes to the study plan. Communication between the student, study counsellor and IRC is important.

**During mobility LA for studies** registers changes of the proposed mobility programme: **Table A2** includes deleted or added courses/modules. **Table B2** registers changes for recognition by Sending institution.

<sup>6</sup> Please consult your National Agency about the grant sizes applied to and from a concrete Region of Partner Country(ies)

<sup>7</sup> OLS courses will not be applicable for international credit mobility (in the call of 2016)

**During mobility LA for training** registers changes of the proposed mobility programme:  
**Table A2** includes exceptional changes in the agreement for traineeship.

### Step 10 Monitoring

In case of problems during the exchange period the student can turn to the IRC of the sending or receiving institution. It is advisable for the IRC of the home institution to check upon the student at least once during the exchange period.

## After the Mobility

### Step 11 Recognition documents submitted to the home institution

The sending institution must give full academic recognition for satisfactorily completed activities during the mobility period as agreed in the Learning Agreement, by using **ECTS credits**<sup>8</sup> or an equivalent system. The mobility period should be included in the final record of student achievement, in the [Diploma Supplement](#) or equivalent.

ECTS GOLDEN RULE FOR RECOGNITION must be respected by all partner institution: „All credits gained during the study period abroad or during the virtual mobility as agreed in the Learning Agreement and confirmed in the Transcript of Records – should be transferred without the delays and counted towards the students degree without any additional work by or assessment if the student“ (ECTS guide, p. 34).

**After mobility LA for studies.** Minimum requirements to be included in the sending institution's study register concerning the recognition of the exchange studies are provided in the LA (**Table C**). The receiving institution must provide the student and the sending institution a confirmation that the agreed programme determined in the LA has been completed, marking the number of ECTS credits and obtained grades.

A Transcript of Records printed out from the receiving institution's study register can replace **Table D** in the LA if the content is the same. Confirmation of the study period is an integral part of the After mobility LA and separate confirmation document therefore should not be requested. The sending institution is required to provide the student's results within the period stipulated in the IIA. This should be done within five weeks after the publication of the student's results at the receiving institution.

Students have to pass the 2nd online language assessment after the mobility.

Confirmation of stay is required both in the case of studies and traineeship. **After mobility LA for training** Table D includes a traineeship certificate by the receiving institution/enterprise, and a confirmation of the training period.

It confirms the start and end date of the mobility period and therefore serves as a verification that the payment of the grant was in accordance with the actual length of the exchange. The start date is the first day of attendance in an institution, e.g. orientation or language training. The end date is the final date the student is required to be present in the institution. NB! No extra days for travel or relocation can be included into the length of the mobility period anymore.

<sup>8</sup> <http://ec.europa.eu/education/ects/users-guide/index.htm>

## **Step 12**

### **Report to ECAS - Mobility Tool**

Mobility Tool is a web platform for collaboration, management and reporting of mobility projects under the Erasmus+ programme. The IRC is responsible for entering the mobility data and participant details into the system.

Mobility Tool automatically sends out requests for participant reporting after the end of the mobility period, as indicated in the "End date" field of the mobility details. The participants receive an invitation to fill in the report on their mobility.

The participant report is in the form of a web-based questionnaire with single choice, multiple choice and matrix- type of questions.

## **Step 13**

### **Evaluation**

It is expected that receiving and sending institutions will monitor the mobility and evaluate its quality. Success of every single activity is very important for further successful cooperation between the two institutions. It is expected that good practice and success stories will be disseminated at least at the sending institution. The IRC of the sending institution is advised to meet with the students after the exchange as a follow up. Information can also be sent to the NA at their request.

## **STAFF MOBILITY**

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### **Regulations**

Erasmus+ provides the following opportunities for teaching and non-teaching staff employed in a higher education institution:

- teaching visits to partner institutions (workshops, master classes, examining visits etc.)
- training visits (job shadowing, continuous professional development activities)

The minimum length of staff mobility for teaching and/or training is 2 days; maximum length is 6 weeks (travel days excluded). In all cases, a teaching activity has to comprise minimum 8 hours of teaching per week (or any shorter period of stay).

### **Before the Mobility**

#### **Step 1**

##### **Call for applications/selection**

The IRC of the home institution can organise an annual information event and/or send out an email to the intranet/internal mailing list with information of mobility possibilities and asking those interested in exchange to contact the international relations office. An internal deadline is advisable. Teachers can also be appointed/invited by management based on strategic consideration (continuous professional development, international recruitment etc.).

#### **Step 2**

##### **Grant application submitted to the National Agency**



The grant application needs to be submitted by the yearly call for proposals to the National Agency (NA) of the country of the applicant organisation. The application period usually takes place in March. Please follow the information given by your NA concerning the annual call for proposals.

### Step 3

#### **Internal application for teacher exchange**

Staff members are selected by the sending institution. The minimum requirement (for teaching activities) is the level of knowledge of foreign language indicated in the inter-institutional agreement (IIA).

Each sending institution or department can set its own selection procedures and criteria. To offer equal opportunities for teachers and staff, it is advisable to announce a call for applications in the institution at least once a year. Although filling in specific application forms is not required, an internal application form can be helpful when collecting the staff visit proposals and plans.

### Step 4

#### **Internal decision on selection results**

Some institutions might want to give priority to certain strategic areas. For example, exchanges comprising additional value e.g. project preparation, lectures integrated into the regular study programme of the receiving institution, preparation of new study material can be prioritized.

It is recommended to widen the scope of the exchange possibility to as many staff members as possible, therefore first time exchanges should be encouraged and supported. Additional activities such as performance activities (concerts), lectures on specific topic(s), research activities, etc. should be agreed by both sending and receiving institutions in advance.

### Step 5

#### **Agreement between home and host institution**

There are two ways of making an agreement for staff exchange. Either the initiative comes from the host institution who invites a staff member or from the sending institution potentially after the internal selection procedure. Note that the internal selection does not by itself guarantee that the mobility will take place! The receiving institution must have agreed on the duration of the visit and activities to be undertaken by the visiting teacher or staff member before starting the official procedures. When mobility is approved by the receiving institution, an invitation letter or e-mail will be sent.

### Step 6

#### **Mobility Agreement for teaching/training approved by the home and host institutions**

The Mobility Agreement for teaching and training visits is the foundation of mobility. The documents need to be confirmed and approved by the member of staff, the sending and the receiving institution. This guarantees that the sending institution counts the Erasmus+ exchange period into the staff member's working hours. In addition, a Grant Agreement should be signed between the teacher and the home institution:

#### **Staff Mobility Agreement for Teaching**

#### **Staff Mobility Agreement for Training**

### Step 7

#### **Payment of grants to staff members**

The sending institution distributes grants by signing an agreement with the outgoing staff member. HEI at programme country concludes the agreement for both outgoing and incoming staff members in case of **international credit mobility**.

Staff members are awarded Erasmus+ grant: a lump-sum to help cover the mobility costs including travel and subsistence costs incurred in connection with teaching/training period abroad. National Agencies will give instructions for calculating the Erasmus+ staff mobility grants for staff visits. Travel grants are calculated according to the [travel distance](#), duration of stay (number of



days including travel dates) and daily rate per [country group](#)<sup>9</sup>. The total individual support for staff (subsistence cost) is defined by each National Agency and/or sending institution and has to be published on their websites.

The full amount of the grant might be paid out to the staff members as a lump-sum or it might be used to cover the actual costs depending on national legislation or institutional policy.

The institutions are advised to budget additional funding for staff mobility as Erasmus+ grants are often not sufficient to cover the mobility costs.

Teaching hours should be included in the normal workload of the teacher. No extra salaries should be required in connection with the Erasmus+ mobility. This could pose a challenge to part time teachers, for whom special arrangements might need to be made.

## **Step 8**

### **Language assessment**

There are no formal language assessment criteria. However it is expected that the sending institution respects the obligation taken by signing the IIA where it is indicated what the working languages are and what level is required.

If the outgoing staff member needs to improve his/her language skills, the sending institution can offer language courses from Organisational Support (OS) funds.

## **After the Mobility**

## **Step 9**

### **Confirmation of teaching/training signed by the host institution**

The confirmation certifies that the staff member has undertaken the teaching/training assignment under the Erasmus+ programme. It is a document confirming the arrival and departure dates and the scope of teaching/training and possible other activities (concert performances, participation in examinations etc.) in hours, and serves as a verification of the payment of the teaching or training grant.

## **Step 10**

### **Report to ECAS - Mobility Tool**

Mobility Tool is a web platform for collaboration, management and reporting of mobility projects under the Erasmus+ programme. The IRC is responsible for entering the mobility data and participant details into the system.

Mobility Tool automatically sends out requests for participant reporting after the end of the mobility period, as indicated in the "End date" field of the mobility details. The participants receive an invitation to filling the report on their mobility.

The participant report is in the form of a web-based questionnaire with single choice, multiple choice and matrix- type of questions.

## **Step 11**

### **Evaluation**

It is expected that host and home institutions will monitor the mobility and evaluate its quality. Success of every single activity is very important for further successful cooperation between the two institutions. It is expected that good practice and success stories will be disseminated at least at the sending institution. Information can also be sent to the NA at their request.

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<sup>9</sup> Please consult your National Agency about the grant sizes applied to the mobility to and from a concrete Region of Partner Country(ies)

