

CHARM-EU (CHALLENGE-DRIVEN, ACCESSIBLE, RESEARCH-BASED AND MOBILE EUROPEAN UNIVERSITY)

DELIVERABLE D5.5 - CHARM-EU: CRITERIA FOR MOBILITY OUTSIDE CHARM-EU – CHALLENGES AND RECOMMENDATIONS

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EXECUTIVE SUMMARY: CRITERIA FOR MOBILITY OUTSIDE CHARM-EU

In line with the aim of making mobility the norm within the Alliance, CHARM-EU is also dedicated to summarising the key points and practicalities of its mobility system in order to support other European University Alliances in developing their own mobility systems. Since CHARM-EU has put a special emphasis on the development of its joint degree programme and its corresponding mobility system, this document focuses particularly on the challenges and solutions implemented in connection with its existing master's programme, while also presenting some solutions on how to make mobility the norm in other joint programmes.

The document is advised to be read together with the papers on CHARM-EU's Interactive Mobility Matrix System and Unique Funding System that can be found in the [CHARM-EU Toolkit](#). These documents provide a step-by-step guideline on how to identify and integrate mobility into the curriculum and the teaching and learning strategies, as well as to define the financial scheme to be used to cover mobilities within the joint programme. Once the integration is successful, the Interactive Mobility Handbook provides a detailed description on how to manage and administer mobility within Alliances.

Chapter 1 focuses on the aims of the document, while Chapter 2 summarises those challenges CHARM-EU faced through the design and implementation of its master's programme and its corresponding mobility scheme. The document elaborates on the challenges connected with setting up and running the mobility scheme related to the joint master's programme, including national and institutional issues around finances, scheduling, support, etc.

Chapter 3 elaborates on the solutions used and actions put in motion by CHARM-EU in order to overcome the challenges described in previous sections. Building on the lessons learnt throughout the implementation, Chapter 4 gives useful tips and suggestions to other European University Alliances willing to adapt the solutions used by the CHARM-EU Alliance. Finally, Chapter 5 provides suggestions and recommendations for the European Commission to further develop the policy framework and the supporting initiatives.



CHAPTER 1 – INTRODUCTION

In line with the aim of making mobility the norm within the Alliance, CHARM-EU is also dedicated to summarising the key points and practicalities of its mobility system in order to support other European University Alliances in developing their own mobility systems. Since CHARM-EU has put a special emphasis on the development of its joint degree programme and its corresponding mobility system, this document focuses particularly on the challenges and solutions implemented in connection with its existing master's programme, while also presenting some solutions on how to make mobility the norm in other joint programmes.

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Providing joint programmes for their students is one of the flagship activities of the European University Alliances. Some of the EUAs, like ARQUS or Una Europa started to develop a joint programme in the first project phase. CHARM-EU was the first one to start to run its freshly developed and accredited joint master programme in September 2021. Other EUAs committed themselves to do so in the coming years. How to integrate mobility in the joint programmes, what kind of challenges EUAs have to face concerning mobility related to joint programmes, what are the possible solutions and suggestions for the future – these are the questions for which EUAs have to find relevant answers. In the following chapter we are going to present how CHARM-EU handled these challenges.

CHAPTER 2 - CHALLENGES

NO FINANCING GUARANTEED FOR MOBILITY

Erasmus Mundus has been a high profile, prestigious action for supporting the development and the implementation of joint master programmes for several decades. One of its main advantages is that it provides a dedicated funding for the scholarships of the participant students for at least 4 editions, each lasting from one to two years. This makes the requirement of spending at least 2 study periods in 2 countries (which must be different from the country of residence), financially feasible. There is no doubt that an Erasmus Mundus Joint Master programme requires a high level



of financing: the contribution to the institutional costs is 750 EUR / month / student, additionally, scholarship for the students is 1400 EUR / month.

There is no similar budgetary line for the EUAs. Certainly, EUAs might have dedicated part of their budget for mobility activities, but the size of their budget made it impossible to follow the Erasmus Mundus Joint Master scheme.

CHARM-EU example:

The CHARM-EU joint master programme is for 18 months. The original idea was to run the programme with 100 students per edition. In the Erasmus Mundus JM financial scheme, it would have required 4,43 MEUR:

- *Contribution to the institutional costs: 18 months x 100 enrolled students x 750 EUR = 1,35 MEUR*
- *Scholarships for the students:*
 - o *first edition: 18 months x 100 enrolled students x 1400 EUR = 2,525 MEUR*
 - o *second edition: 4 months x 100 enrolled students x 1400 EUR = 0,56 MEUR*

The total EU grant for CHARM-EU was only 5 MEUR – not just for developing and running the joint master programme but for all its complex activities, for laying the foundation of the EUA, so evidently there was no chance to finance the mobility related to the joint master programme from the project budget.

JOINT PROGRAMME VS. NATIONAL DIFFERENCES

In the case of joint programmes, it would be a reasonable expectation to have common rules also concerning mobility across the partner universities. Therefore, while EUAs can rely on any mobility programme available for them even only at a national, regional or institutional level when they intend to increase mobility with the EUA partners on a bilateral basis – in the case of joint programmes, it should be avoided. As the simplest way (to use the budget of the EUA project) is not feasible, other financial resources are needed. Theoretically, the Erasmus+ programme as an EU programme implemented in 33 countries in Europe would be an optimal solution to finance mobility related to the joint programmes: programme objectives and priorities; the target groups; the actions with the main requirements (activities, duration, etc.) are identical in all the participating countries. Erasmus+ is well-known amongst the target groups, and it is easy to build on the existing info materials and administrative procedures.

On the other hand, Erasmus+ is a decentralised programme, where a number of details are decided at national or even at university level.

FINANCIAL DIFFERENCES

Budget

The budget of the partner universities might be different, in some cases even extremely different. Consequently, the financing of the same activity might be easily covered by one of the partner universities while for some of the others it might cause serious financial difficulties.

CHARM-EU example:

- *At some partners, where the Erasmus+ budget was smaller than the demand of the target groups, to provide multiple Erasmus+ scholarships for the CHARM-EU students caused tensions, or the budget available for staff mobility (also closely interrelated with the joint programmes) has huge differences across the CHARM-EU partners.*

Certainly, Erasmus+ programme ensures equal treatment and equal opportunity inside each university, each student of a specific university might participate in the programme under the same conditions. This is not given across the universities, so sometimes one can be faced by significant differences between the financial aspects of the students studying at the same host university but coming from different sending university. However, this is justified by the different national contexts and national regulations together with the institutional ones in case of the traditional Erasmus+ mobility. In case of a joint programme this is more controversial.

Eligibility and calculation of the grant amount

In case of the Erasmus Mundus Joint Master scholarship scheme, it is prescribed to scholarship holders to spend a minimum of two study periods in two countries (an EU Member State or third country associated to the Programme) that must be different from the country of residence of the student at enrolment stage. This is not a prerequisite in the case of a traditional Erasmus+ grant that is used in case of the CHARM-EU master's programme. Therefore, in order to define the eligibility of receiving Erasmus+ grant, only the criteria assigned to the Erasmus+ KA131 financial strand must be followed, there is no need to take into account the country of residence to the allocation which can cause a variety of challenges in terms of equal treatment of students.

While the major elements of the way the Erasmus+ grant amount is calculated are identical at programme level (unit cost based funding for the participants), there are some important aspects where the practice of the Members States / participating universities is different, particularly relating to the innovations of the current programme: number of travel days in case of Blended Intensive Programmes; number of additional days for travelling in case of green mobility; detailed definition of green mobility etc.

**CHARM-EU example:**

- A CHARM-EU student indicating the Netherlands as his/her country of residence who starts his/her study journey at the Eötvös Loránd University receives a much higher amount of Erasmus+ scholarship than another student whose country of residence is Estonia and starts his/her studies at the University of Barcelona in case both of them going to the Utrecht University.

Size of the grant amounts

Grant amounts to the same destination country might be different depending on the rules of the sending country. It might happen that students of the same joint programme, studying in a particular semester at the same university but coming from different partner universities are getting different grant amounts (in some cases the difference might be significant).

CHARM-EU example:

- Students from the University of Barcelona going to Trinity College Dublin received 300 EUR / month, while
- Students from Eötvös Loránd University going to Trinity College Dublin received 520 EUR / month.

The way of pre-financing

In the mobility actions of Erasmus+ there is a partial pre-financing, a larger part of the grant is paid in advance, at the beginning of the mobility, and the remaining part of the grant is paid only after the mobility is completed and all the requirements are fulfilled (report prepared, transcript of records provided). Some of the universities are paying the first instalment before the start of the mobility period, others are paying only after a certificate of arrival was issued.

CHARM-EU example:

- University of Montpellier requires a certificate of arrival as a precondition for triggering the first instalment, while the others do not.

First instalment

The first instalment paid by the sending university might be different.

CHARM-EU example:**Percentage of the pre-financing:**



- ELTE – 90%;
- Trinity College Dublin, University of Barcelona, Utrecht University – 80%;
- University of Montpellier – 70%.

NON-EUROPEAN DESTINATIONS

Sometimes a non-European destination would be the optimal venue for a mobility in case of a joint programme. However, the financing of it is even more difficult, as the Erasmus+ International Credit Mobility action (KA171) is an extremely complex and rigid scheme, where the budget is devoted to specific geographical regions without any chance to shift part of the budget from one region to another, furthermore in most cases the demand is much higher than the budget available and the selection procedure is longer – an EUA cannot rely on this action when the financing of an integrated mobility should be ensured.

The new opportunity provided by the current phase of the Erasmus+ programme to use max. 20% of the KA131 budget for financing the mobility to non-programme countries would be an easier solution – as the procedure of it is identical with the standard KA 131 procedure. Unfortunately, there are also some obstacles here. First of all, a significant part of the universities do not use this opportunity at all, or only for the mobility to the UK, as they have to use their entire budget available for the programme countries due to the high demand. Furthermore, non-European destinations are more expensive which might cause budgetary problems.

CHARM-EU example:

- *As the CHARM-EU's joint master programme (Master's in Global Challenges for Sustainability) focuses on global challenges, the programme offered some challenges for the students during the last semester (in the Capstone Phase) also in Africa thanks to the global partners of some of the partner universities and two teams have spent a longer period there. For the reasons presented in the previous paragraph, there was no chance to find common financing resources for this, so the University of Montpellier and one of the global partners ensured the necessary funding for the pilot phase.*

ADDITIONAL FUNDING, INCLUSION

Additional funding of students with special needs or socially disadvantaged students is deeply embedded to the national context of the universities. This means that different top-up grants might be available for them under different conditions at the partner universities.



TIME SCHEDULE

Universities have their traditional timeline for the mobility procedure, the publication of the call for proposals, the deadline for the submission of the applications, the selection, the preparation of the grant agreements might be at different time.

CHARM-EU example:

- *While at the Utrecht University the application deadline for student mobility in the following academic year (e.g., 2023/2024 academic year) is set in December in the previous year (e.g., December 2022), at the Eötvös Loránd University it is 2 months later, in February (e.g., February 2023).*

ADMINISTRATIVE PROCEDURES

Universities across the Erasmus+ programme countries have different administrative procedures to handle mobility applications, from the registration through the selection till the preparation of the grant agreements, different documents are required, different actors are involved, different steps are made. While certain steps are digitalised at one of the partners, paper-based procedures are followed at the other one. The documents required by the sending universities from the applicants might include CVs, motivation letters, info about different aspects of their studies, extracurricular activities, language attainment level, etc., including the different format of underlying documents.

CHARM-EU example:

- *While at the University of Montpellier a pdf print of the filled OLS closing test is required to close the mobility agreement, at Eötvös Loránd University this is not needed.*

TECHNICAL SUPPORT

Universities have different software to support the management of mobility. In some / increasing cases it is a pre-condition to fund a mobility that the application was submitted through this mobility software. Therefore, the mobility grants of the students in the same joint programme are handled separately by different systems and probably the allocation of the students between the partner universities should be facilitated by a further system.

CHARM-EU example:

- *Eötvös Loránd University: currently, no single management software, it is in the process of buying one of the systems*
- *Utrecht University: national system, student management system connected directly*
- *University of Montpellier: MoveON*
- *Trinity College Dublin: MoveON or Mobility-Online will be used by 2023*



- *UB: Mobility-Online*

SENDING UNIVERSITY

Even the classical bilateral Erasmus+ logic of ‘home’ or ‘sending’ university vs. ‘host’ or ‘receiving’ university was difficult to interpret in case of a joint programme of a multilateral European University Alliance. Each student is registered in the learning management system of each of the university. The study programme is identical regardless of the university the students are staying at. Credit recognition in the usual sense of the term is not relevant, as the same modules / learning units are administered at both the ‘sending’ and ‘hosting’ university, credits are automatically input in the joint learning management system. This makes the standard documents of Erasmus+ student mobility (*Mobility Agreement, Transcript of Records*) less relevant.

Furthermore, the number of students from different countries than the partners of the joint programme is usually high. In current Higher Education systems the proportion of international students is high. Still the link of an international student to its university who opted for a specific university for an entire study programme is stronger than in case of a student in a joint programme who is committed to a consortium of universities providing jointly the study programme.

BLENDED MOBILITY VS. SEMESTER MOBILITY

In case of a joint programme it might happen that for pedagogical reasons a shorter mobility is organised during a semester mobility. There was no former experience about it at the National Agencies. This is clearly not a double funding issue, as an additional activity is the precondition for the additional funding but there are no detailed rules how to calculate the funding in this specific case.

CHARM-EU example:

- *During Phase 2 when students of the joint master programme were spending a semester mobility period at a different partner university than the one where they started the programme, each track organised 2-2 Erasmus+ Blended Intensive Programmes for them. Those students who had to travel to the venue of the BIP were provided a blended mobility grant (the semester mobility grant was interrupted for the duration of the BIP).*

CHAPTER 3 – SOLUTIONS APPLIED BY CHARM-EU

CHARM-EU finally decided to use the Erasmus+ mobility budget of the partner universities to finance mobility of students in the joint master programme both for semester mobility and blended mobility. The size of their Erasmus+ KA 131 budget was sufficient without any major problem for the financing of semester mobility, but the financing of the multiple blended mobilities caused some

tension at certain partners. The semester mobility grant was suspended for the period of the physical part of the blended mobility.

However, the project budget was used when a mobility was not eligible under Erasmus+ – in the case of students returning for a blended mobility programme to their starting university from a semester mobility spent at another partner university (in the CHARM-EU interpretation the university where the student started the joint programme is the ‘sending’ university). Furthermore, the project also financed top-ups for inclusivity reasons. Both were crucial from an inclusivity point of view.

In case of the joint master programme, CHARM-EU did not rely on the normal Erasmus+ mobility procedures. While normally the mobility applications of the students should be submitted by 7-10 months earlier than the start of the mobility, in CHARM-EU, the procedure could start only much later, just 3 months earlier than the start of the semester. Consequently, an additional call had to be organised.

A common Call for proposals was prepared before each major mobility action by the CHARM-EU Mobility WG and published by the Joint Virtual Administrative Office. The students submitted a simplified application form to a joint database. After the eligibility check done by the JVAO the relevant departments of the partner universities who are responsible for the management of the Erasmus+ mobility grants prepared the grant agreements. This process was facilitated by the JVAO colleagues as the Learning Agreements were prepared by them. Similarly, the issuing of the Transcript of records was assisted by the JVAO colleagues.

CHAPTER 4 - SUGGESTIONS FOR OTHER EUROPEAN UNIVERSITY ALLIANCES

On behalf of the mobility expert team, we suggest to:

- a) Integrate mobility in the joint programme in close cooperation of the working groups responsible for the pedagogical development on the one hand and mobility on the other hand. Make a decision on the number of mandatory semester mobilities. To study at least at two different partner universities (in two different countries) might be a reasonable solution.
- b) Use your Erasmus KA131 budget to finance semester mobility of students in joint programmes.
- c) Keep embedded semester mobility inside the partner universities (e.g., in the programme countries) and avoid non-European destinations, as organising mobility outside Europe



takes much longer time and it is even more expensive. If this is inevitable, use the 20% of your KA131 budget and definitely not the International Credit Mobility (KA171) budget.

- d) Additionally, dedicate a specific budget line for mobility from the overall budget of the Alliance – this could be used for top-ups in inclusivity cases or for those activities which are not eligible under Erasmus+.
- e) Ensure inclusion at all stages of the mobility procedure. The best way to do so is to set-up a specific working group with the necessary experience and profile.
- f) Take into consideration the academic calendar of the joint programme, publish a common, yet separate call for application for the students across the partner universities.
- g) Make a commitment on the financial support of the eligible proposals – involving the leaderships of the partner universities (including the departments responsible for the Erasmus+ programme). It should be clear for the students that the semester mobility is part of the joint programme and the financial support is ensured.
- h) Apply one application round covering both semester mobilities that would ensure the mobility scheme to be more predictable.
- i) EUA actors to coordinate rather than implement the mobility procedure. The most efficient way to run the mobility procedure is to follow the normal Erasmus+ procedures of the partner universities (with some simplification), using the capacities of the IROs / Erasmus+ offices and to avoid building a parallel structure just for the EUA mobility. However, a special assistance should be provided for the students in the joint programmes in order to strengthen the image of the joint programme and to guide the students through the complex and different institutional procedures. The mobility offices / working groups of the EUAs should have a key role in the coordination.
- j) As the national / institutional level differences cannot be eliminated entirely, provide with a clear guidance on both the EUA level and the university level requirements.
- k) Simplify the application form as much as possible, keeping only the most relevant information.
- l) Leave at least 3 months for the preparation of the grant agreements and the transfer of the first instalment.



- m) Consult all the Erasmus+ National Agencies concerned once you prepared your mobility scheme in detail, in order to check the eligibility of your solutions from Erasmus+ point of view.

CHAPTER 5 – SUGGESTIONS FOR THE EUROPEAN COMMISSION

- a) After a thorough consultation with the EUAs (partly directly and partly through the FOREU networks) and the Erasmus+ National Agencies a specific definition should be prepared for mobility related to the joint programmes, clarifying the role of the sending / hosting university in this specific context.
- b) The standard Erasmus+ mobility documents (*Mobility Agreement, Transcript of Records*) should be adopted accordingly.
- c) In the long run, we would suggest designing a specific Erasmus+ mobility action particularly for semester mobility¹ but even for blended mobility related to joint programmes in the framework of EUAs. This would provide scholarships for the students participating in the joint programmes (following the Erasmus Mundus scheme) but would not contain the 750 EUR / student contribution to the institutional costs of the universities only the normal organisational costs of Erasmus+ mobility in order to avoid any double funding issue as these costs are more or less covered by the budget of the EUA project.
- i. Optimally, it would be a centralised but simplified action, a specific top-up grant to the normal grant agreement made between the European Commission and the EUA. The basis for the additional grant would be the foreseen number of the participating students, with a predefined limitation. The reasoning for this scenario is the following:
- i. The joint programme is not run separately by the universities rather jointly by the EUA;
- ii. There would be only one grant amendment at EUA level, so the administration would be less heavy;

¹ The current blended mobility action has already the same financial rules across the programme countries, the related mobility procedure is not so heavy therefore it is not needed to extend the new action also for blended mobility



- iii. The grant amount could be flexibly moved between the partner universities in line with the demands of the students and the capacities of the universities;
- iv. National differences related to the mobility procedure could be limited to the minimum.

However, as the legal basis of the Erasmus+ programme does not contain this action, and the amendment of the legal basis is a lengthy process, it would be more feasible to design the action as a decentralised one: as a sub-action of the KA131 activities but with the same conditions across the programme countries (like in case of blended mobility, the same unit cost would be used regardless of the sending / hosting countries). This way, the grant would be provided by the respective National Agencies for the partner universities and not directly for the EUAs, which would cause somewhat more administration, but still this scenario would fix most of the problems presented earlier.