

IN-DEPTH ANALYSIS ON MOBILITY FUNDING IN ERASMUS AND BEYOND

ERASMUS
FOR ALL
PARTNERSHIP



Co-funded by the
Erasmus+ Programme
of the European Union



Title

In-depth analysis on mobility funding in Erasmus and beyond

Author

Erasmus for All partnership

Funding entity

European Commission through the Agência Nacional Erasmus+ Educação e Formação

Funding scope

Erasmus+ programme, Key Action 2 Cooperation partnerships in higher education

Graphic design

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Co-funded by the
Erasmus+ Programme
of the European Union



This project has been funded with support from the European Union. This publication reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.





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ERASMUS
FOR ALL

EXECUTIVE SUMMARY

The success of the Erasmus programme is undeniable, and since 1987 it allowed the mobility of almost 12 million participants. However, most independent surveys and reports indicate that the participation levels in the Erasmus programme are low, and that low participation is mainly related to the lower economic capacity of most students and their families. The Erasmus for All project¹, comprised of an international and diverse partnership, aims to tackle the low levels of participation in the Erasmus+ Programme by proposing a more economically inclusive scholarship scheme.

The purpose of the present report, which is an output of the project, is to present the main conclusions of the activities carried out by the partnership throughout the first stage of the project's implementation, and which will support and inform the work to be developed by a multidisciplinary team of experts for **suggesting an alternative scholarship calculation methodology**.

Other projects, initiatives and publications have addressed this topic in the past, providing relevant data regarding the European Higher Education student population and highlighting recurring conclusions in the context of student mobility. Issues of funding and finances appear in all of the previous initiatives. **The need for a change in the mobility scholarship scheme is also clearly underlined**. The current scheme has remained unchanged for decades and reveals inconsistencies in the way the Erasmus programme is managed.

Even though Erasmus+ has become more inclusive throughout the years, especially with the new features from 2021 onwards, in practical terms Higher Education Institutions are faced with constraints (both conceptual and financial) that prevent an effective implementation of those measures. The current scholarship system is not able to provide an answer to the needs faced by students within the current socio-economic context, thus corroborating the relevance of a revision of the student support systems that are in place.

Overall, students participating in the Student Social Labs organised by the Erasmus For All partnership agree on the **inadequacy of the criteria for the calculation of a mobility grant**, particularly given the current economic climate in Europe, and high housing costs. The ability to meet the living costs of the host city appears as a core issue for students from all countries. Opinions converged that a better adapted scholarship with rates that were higher and more adjusted to the actual costs of a mobility would provide the opportunity for more students to take part in a mobility. Other aspects concerning the management of the mobility process are also relevant apart from the amount of the scholarship itself, such as the timing of the scholarship payment.

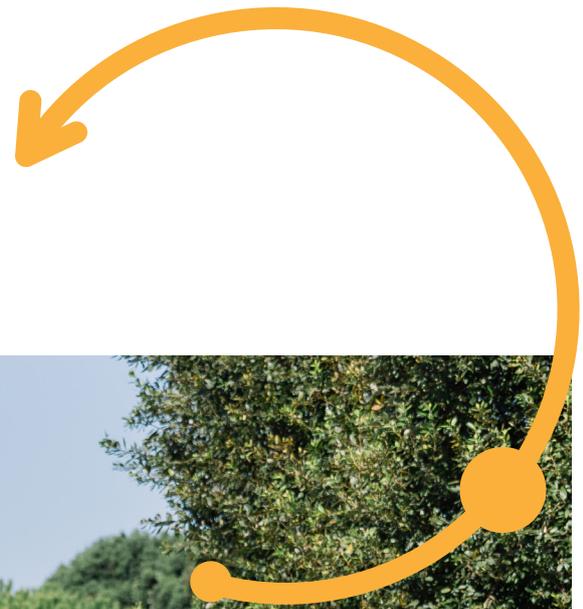
The survey carried out among representatives of the 41 European University Alliances revealed coincident opinions regarding the importance of the Erasmus+ scholarship for the decision of students to partake in a mobility period. Similarly, it was acknowledged that an improved scholarship methodology would have a positive impact in increasing student participation in the programme. The great majority of the respondents to the short survey circulated by the partnership indicated **the cost of living of the host city as the factor that should be considered to determine the amount of the scholarship of a student**.



¹ <https://www.up.pt/erasmus-for-all>

The partnership mapped and analysed other funded mobility programmes and their scholarship schemes. There's no other programme with the dimension of Erasmus+, which awards hundreds of thousands of scholarships every year. Some of the programmes calculate the amount of scholarship based upon socio-economic criteria, whereas others according to destination. Erasmus+ appears as a more customised programme, with National Agencies having an important role in establishing the scholarship mobility conditions in each country. This allows to introduce positive discrimination criteria in terms of the amount of scholarship awarded to certain groups of participants.

The last section of this report outlines desirable characteristics for the scholarship schemes that will be designed by the multidisciplinary group of experts in order to achieve a positive impact in the future of the Erasmus+ programme.



THE ERASMUS FOR ALL PROJECT

CONTEXT AND RELEVANCE

Erasmus is the most successful mobility programme in the world, with an estimate of around 11.7 million participants between its launch in 1987 and the year 2020 (European Commission, 2020)².

This success was also made possible due to developments such as the Bologna Process and the creation of a European Higher Education Area (EHEA), which enabled a significant increase of mobilities between European countries. The establishment and harmonization of the EHEA, through the introduction of a system of easily readable and comparable degrees, as well as common tools of quality assurance and academic recognition, is an undeniably attractive factor for students interested in studying abroad for a short period of time.

Regardless of the success of the programme, all surveys and reports are coherent in highlighting the existence of several barriers of different types that prevent an upturn in the number of mobilities. The overall growth of the mobility rates is noticeably inconsistent among countries, compounded by a national lack of balance between incoming and outgoing students. This difference can be attributed to several push factors, which encourage students to carry a mobility abroad, and pull factors, that encourage students to choose a specific destination. Some of these factors can be influenced by policies, while others are outside the realm of national policies.

Most surveys and reports carried out indicate that the **low participation levels in the Erasmus programme are mainly related to the lower economic capacity of most students and their families**. The Bologna With Student Eyes 2020 Report³ highlights that the financial burdens were cited by national unions of students as by

far the most common and important barrier to both incoming and outgoing mobility, tracking the same information from 2018. It was also found that there are “ever-growing disparities between rising costs of living and studying” and scholarships, which are “chronically insufficient and stagnant in comparison”. According to the SIEM research report “Student and staff Perspectives on Diversity and Inclusion in student exchanges”⁴, 53% of non-mobile respondents reported needing at least 75% of the mobility programme costs to be covered by funding if they were to go abroad, however, only 19% of respondents had at least 75% of their mobility costs covered by a scholarship.

The characterisation of the European Higher Education population also provides important background information for a better understanding of the real needs of the mobile students, and the Eurostudent VII 2018-2021 Report⁵ includes relevant data on this. The majority of students in most countries are women, and student parents make up 11% of all students, usually found among older students. Even though students’ age varies widely across the European Higher Education Area, on average 64% are under the age of 25. An exception to this is to be found in Nordic countries (Iceland, Finland and Norway), where students aged 30 or over make up the largest part of the student population. Where students’ employment is concerned, the report shows that surprisingly almost 80% of students combine studying with one or more paid job(s), and around 60% of all students work during term time. Over half of students work to cover living costs (68%) and, on average, the earnings of students who work during the lecture period make up two thirds of their income. When measured by the international average, it appears that 24% of students report serious or very serious financial difficulties.

² https://ec.europa.eu/commission/presscorner/detail/en/IP_21_6836

³ <https://esu-online.org/wp-content/uploads/2021/03/0037-Bologna-Publication-2021-WEB3.pdf>

⁴ https://siem-project.eu/documents/SIEM_Research_Report_2021_03.pdf

⁵ https://www.eurostudent.eu/download_files/documents/EUROSTUDENT_VII_Synopsis_of_Indicators.pdf

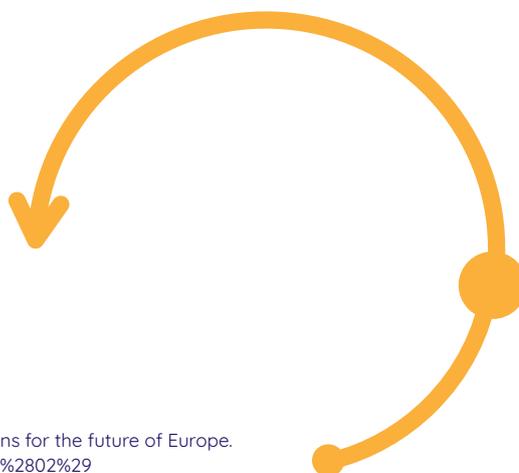
The Report still provides information on the percentage of students with impairments that limit their studies (15%), the most often reported being mental health issues, physical chronic diseases, or ‘other long-standing health issues’. Mobility impairments are on average the least frequent type of impairment – in no country does the share of students reporting mobility impairments exceed 3%. The Report also analyses the student’s educational background and social capital (further detail in section “Other initiatives and projects on the same topic”).

Regardless of their background and conditions, Higher Education students argue that they are unable to support their stay abroad with the current scholarship system, and are consequently unable to access more Higher Education and future employment opportunities. Still according to the already cited SIEM research report⁶, **67% of mobile respondents reported a monthly cost of living while on mobility of over 501 euros a month**. In a recent survey launched by the Internationalisation Area of La Sapienza University of Rome, Italy, of outgoing students during the academic year 2021-22, 80.1% of the 759 respondents felt that the amount of the mobility scholarship was insufficient to cover expenses incurred during the period spent at the host country.

As mobility remains politically desirable and the demanded targets for student participation increase⁷, Universities attempt to comply with the targets through internal strategies. These consist of strategies that range from the attribution of their own additional financial resources to the development of conditions that allow the widest possible participation.

Yet, such solutions are neither sustainable nor ensuring the conditions for the desired global increase of mobile students, who need to find alternative and complementary sources of funding to be able to cover the expenses at the host city while on mobility⁸.

This contextualisation integrates the key findings resulting from the structural reality over the last few years and not the findings of the conjunctural circumstances that have occurred in the meantime. Possibly the pandemic, the Russian-Ukrainian war, and the high levels of inflation have worsened the socio-economic difficulties of the potentially mobile student population and introduced additional challenges in the sphere of Higher Education. For example, the Sustainable Development Goals Report of 2021⁹ shows that “Covid-19 has wiped out 20 years of education gains” and that “Continuing education and training are key to improved livelihoods and to developing a labour force resilient to economic shocks and adaptable to technological change”. The COVID-19 pandemic, which had negative impacts all over the world, showed that the only way forward is to cooperate, not only to face the existing obstacles but also new challenges that might arise.



⁶ https://siem-project.eu/documents/SIEM_Research_Report_2021_03.pdf

⁷ Council conclusions on a European strategy empowering higher education institutions for the future of Europe. <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX%3A52022XG0421%2802%29>

⁸ https://www.eurostudent.eu/download_files/documents/EUROSTUDENT_VII_Synopsis_of_Indicators.pdf

⁹ <https://unstats.un.org/sdgs/report/2021/The-Sustainable-Development-Goals-Report-2021.pdf> - p.13, 36-37

OBJECTIVES

With this issue in mind, **the Erasmus for All project aims to tackle the low levels of participation in the Erasmus+ Programme by proposing a more economically viable scholarship scheme**, therefore allowing any student to carry part of his/her studies abroad in any of the 33 programme countries.

The project intends to contribute to reducing the existing asymmetry in the attribution of Erasmus+ scholarships throughout Europe, by promoting more fairness, inclusion and equity in the scholarship calculation scheme. To do so, the Erasmus for All project gathered reputed institutions and stakeholders in the European Higher Education Mobility area. The main objectives of the project are to:

- keep the topics of inclusion and equity in the policy agenda;
- build a shared understanding among key stakeholders of the desired trajectory/evolution of the Erasmus+ Programme;
- provide relevant and in-depth input for the mid-term review of the current funding framework of the Erasmus+ Programme.

Through the planned activities, the project aims to achieve a fairer and clearer answer to the students' needs, allowing them to participate in the co-creation of the programme. An additional outcome is that the project will provide an active monitoring system to the Erasmus+ Programme, by analysing and identifying the current and potential weaknesses and strengths. This reinforcement of the programme's quality will consequently make mobility a more accessible and equitable opportunity.

METHODOLOGY, ACTIVITIES AND RESULTS

The project will develop a series of activities, events and publications with policy relevance and targeted at European decision makers. These seek to provide insight and produce a transformation in the programme's design, particularly concerning the funding of individual mobility for students.

According to the project's proposal, activities are organised and distributed among four project results.



Project Result #1: Mapping and Research Report

This concerns the present report, the result of the first year of activities carried out by the partnership. The tasks developed in this initial stage of the project include:

- comprehensive research of other similar initiatives or projects that focus(ed) on the same topic and analysis of the conclusions;
- mapping of other scholarship programmes and identification of the scholarship schemes in place under the scope of such programmes;
- research of previous studies concerning the relation between the methodologies adopted under the scope of such programmes and the results of the mobility experiences so as to identify which of the methodologies resulted in higher satisfaction levels of participants;
- organisation of a student participatory activity in each of the partner universities and European Students Union (ESU) to gather the Erasmus students' opinions on the topic – the Student Social Labs. These local events were fundamental to allow the project to listen to the students' voice and thus to ensure a reality-based and co-designed solution.

Project Result #2: Guidelines for a more inclusive scholarship calculation formula

Based upon the good practices and relevant opinions of stakeholders gathered during the first year of activities, the partnership will initiate the core stage of the project, which is precisely the development of the new scholarship calculation methodology/ies.

That process will be led by a transdisciplinary scientific working group comprised of scholars from all the partner universities. This group will be responsible for designing a more inclusive scholarship scheme while considering the multiple variables available, as well as devising a document that gathers the methodologies followed while developing said proposal.

The existing criteria for inclusiveness, targeting fewer opportunities, offer some guidance but also reveal fundamental shortcomings that need to be overcome to come up with generalizable alternative(s) to the current Erasmus+ scholarship scheme.



Project Result #3: E4All Impact Study

Once the transdisciplinary scientific working group concludes its work, the partnership will carry out a small-scale impact study. Through this study, it will compare the current Erasmus+ mobility scholarship and the revised scholarship methodologies proposed by the Erasmus for All project. This pilot experiment will involve a sample of Erasmus+ students, who will be divided into different groups, in order to allow for a valid conclusion and provide comparative data regarding the impact of an alternative methodology to the actual scheme. This study will be carried out by all project partner universities during the 2023/2024 academic year.

Upon completion of this activity, the partnership will publish a Report (“E4All Impact Study”) including the conclusions of the pilot testing 1) the current Erasmus+ programme scholarship system and 2) experimental/technical validation of the new calculation methodology.

Project Result #4: Erasmus4All: Recommendations towards a more social and economically inclusive Erasmus scholarship | Policy Paper

The fourth and last project result will consist of a Policy Paper containing recommendations based upon the conclusions of all previous project results. The experts in European Higher Education policy will analyse and convert the research findings into policy recommendations, and engage key decision-makers and specific stakeholders in policy discussions about the resource allocation strategies that address the needs of the political goal of widening participation in mobility with an equitable approach. The development of this Policy Paper will include a multistep process of mapping key policy documents, designing a segmentation plan for communication, carrying out interviews and finally drafting the policy recommendations.



PARTNERS

All project partners are renowned institutions in the European Higher Education landscape and international mobility fields. The team comprises five universities:

- University of Porto, Portugal (UPorto) (coordinating institution)
- La Sapienza University of Rome, Italy (UniRome)
- Trinity College Dublin, Ireland (TCD)
- University of Pécs, Hungary (PTE)
- University of Versailles Saint-Quentin-en-Yvelines, France (UVSQ)

It also includes three organisations:

- European Students Union, Belgium (ESU)
- European University Foundation, Luxembourg (EUF)
- France Universités, France (FrU)

And additionally, three associate partners:

- Deutscher Akademischer Austausch Dienst, Germany (DAAD)
- Santander Bank, Portugal
- SGroup Universities in Europe, Spain (SGroup)

As a result of their internationalisation activities, particularly mobility implementation and management activities, the partner universities offer important and valuable know-how in mobility matters. Through their projects and cooperation networks, these universities have always been involved in the promotion of inclusion under the Erasmus+ Programme.

The partner and associate organizations have also been deeply involved with the subject of mobility in the Higher Education sector through various projects, seeking the betterment of the student mobility experience and its related administrative procedures. Due to their experience of working closely with and/or towards the European Higher Education Institutions and other relevant stakeholders and policy makers, they will provide unique and valuable contributions for the development of the project's outputs and for the dissemination and promotion of the project at the international level.



OTHER INITIATIVES AND PROJECTS ON THE SAME TOPIC

Preceding the Erasmus for All project, a small number of other projects and initiatives have already addressed the topic of inclusive mobility, such as the SIEM Project (Social Inclusion and Engagement in Mobility), #Erasmus500 campaign, and PLAR-4-SIMP, which published final reports of particular interest in relation to the Erasmus for All project. Similarly, related publications have revealed relevant data concerning the participation of students in the Erasmus+ Programme, in particular “Bologna with Students Eyes”.

An important contribution on this topic has also been provided by the Eurostudent VII 2018-2021 Report, which highlights social capital as a determinant in the students’ intentions to take part in an enrolment period abroad. According to the report, this determinant is generally greater among students with a tertiary education family background than among their fellow students without a tertiary education family background. **Students with low socio-economic background face a double disadvantage:** firstly, they have a lower probability of undertaking a mobility given their background characteristics; secondly, they are likely to be clustered in those universities and fields of study where opportunities of mobility are low (Schnepf, Colagrossi 2020:449).¹⁰ Also, **disadvantaged students¹¹ evaluate studying abroad as less advantageous than so-called advantaged students, because they start from less favourable conditions** (Loerz et al., 2016¹²; Schnepf, Colagrossi, 2020).

At a first analysis, it might seem that disadvantaged students, compared to Erasmus students, consider personal and social factors above economic ones (Souto-Otero M. et al., 2013). One hypothesis could be that they exclude themselves *a priori* through a self-assessment of their economic conditions and conclude that they are not suitable for such an experience. One way to break this vicious cycle could be to improve the students’ awareness that the financial aspect does not have to be an obstacle to studying abroad (e.g., by including this information in Erasmus calls, advertising it in various university secretariats, etc.). Other findings show that, although personal development aspects are of great importance, the main motivation for students to undertake study periods abroad is of economic nature (Rosenzweig 2006; European Parliament, 2010).

In this section, a brief presentation of the main conclusions of the above-mentioned initiatives/report are briefly described as they constitute important starting points for the activities and proposals of Erasmus for All by providing key elements for the definition of the alternative methodologies to be proposed under this scope.

¹⁰ Schnepf, S. V., & Colagrossi, M. (2020). Is unequal uptake of Erasmus mobility really only due to students’ choices? The role of selection into universities and fields of study. *Journal of European Social Policy*, 30(4), 436–451. <https://doi.org/10.1177/0958928719899339>

¹¹ According to the Erasmus+ Programme Guide, participant with fewer opportunities are people who, for economic, social, cultural, geographical or health reasons, a migrant background, or for reasons such as disability and educational difficulties or for any other reasons, including those that can give rise to.

¹² Lörz, M., Netz, N., & Quast, H. (2016). Why do students from underprivileged families less often intend to study abroad? *Higher Education*, 72(2), 153–174. <http://www.jstor.org/stable/24756975>

SIEM Project - Social Inclusion and Engagement in Mobility¹³

Social Inclusion and Engagement in Mobility (2019-2022) is an Erasmus+ project launched by the European Student Network that aimed to widen student participation in the Erasmus+ Programme and to increase engagement between students and the local communities. The project produced a research report that offers the most up-to-date literature review as well as an overview of relevant empirical evidence on international student mobility in general, and Erasmus in particular. The study sheds light on two critical aspects of student mobility: accommodation and travel.

In a Handbook developed for International Relations Offices working with student mobility¹⁴, the partnership provided tools and insights on how to increase the number of mobile students in groups who traditionally do not participate in mobility programmes.

Regardless of their value and relevance to the European Higher Education Institutions, the authors remind the readers that these suggestions will not solve the lack of financial support. So, while not fully addressing the financial issues and needs for individual mobility, the guidelines still provide the readers with some useful information and concepts.

According to their studies, the typical Erasmus student is most likely to be female, in his/her early twenties and from a university in a Western European country. **The majority of students have at least one parent who obtained a Higher Education degree and a higher socio-economic status when compared to their peers.**

In the referred Handbook it is mentioned that regardless of their profile, the students identified the additional financial burden as the main obstacle to carry out a mobility, with the separation from family and friends as second, and the loss of a paid job that would support their expenses as third. Nevertheless, students with a Higher Education background seemingly found the obstacles easier to overcome than the rest of their peers. This lack of capacity to overcome and/or eliminate obstacles should be tackled with the development of policies that would compensate students who do not meet this profile.

Over the time, the participant profile seems to have been widened, with an increase in participation of students with lower-than-average household income. Yet, having parents with a Higher Education background remains an important factor in explaining participation in the Erasmus+ programme.

For the rest of the document, the authors offer guidelines on how Higher Education Institutions can encourage disadvantaged students to carry a mobility. Such guidelines address three main topics: collaboration within the HEI and with external stakeholders, visualisation, and communication.

¹³ <https://siem-project.eu/>

¹⁴ Guidelines for Inclusive Mobility Promotion. Supporting in- and outbound student mobility, available at: https://siem-project.eu/documents/Guidelines_for_Inclusive_Mobility_Promotion_2021_03.pdf

Erasmus500¹⁵

Erasmus500 (2020) was a campaign launched jointly by the Erasmus Student Network, the European University Foundation and European Students' Union as a self-proclaimed radically simple reformulation of the Erasmus scholarship calculation scheme, with the establishment of a universal minimum baseline scholarship of 500 € per month. This amount, on which top-ups could be added, was defined as a realistic minimum that would ensure a bigger coverage of costs and liberty of choices for students.

On their open letter to the European Commission, the signatories consider the financial burden as the largest obstacle to mobility. They argue that the scholarship has not kept up with the cost of living, leaving the students to rely on their family's support when partaking in a mobility. The global COVID-19 pandemic's ripple effects are still being sensed and mitigated, which has only worsened these inequalities in the Higher Education Sector.

On a survey for the campaign, mobility officers agreed with the necessity of a change in the mobility scholarship scheme, claiming that many students cancel their mobilities due to an insufficient amount received. Many think that a €500 minimum scholarship would encourage more students to apply for a mobility.

This initiative considers the current resource allocation strategies between countries inconsistent, and the average scholarship amount too low to cover basic costs and properly aid students from lower socio-economic backgrounds during their mobility. The proposed alternative would also reduce administrative burden and costs, allowing even more budget to be allocated to the students.

The project's campaign, that ended in 2020, had the support of several individuals, Higher Education Institutions, international organizations related to the European Higher Education Area, as well as many European Parliament members.



¹⁵ <https://erasmus500.eu/>

PLAR-4-SIMP Project - Peer Learning Activities and Resources for Social Inclusion in Mobility Programmes¹⁶

Peer Learning Activities and Resources for Social Inclusion in Mobility Programmes (2020-2022) relied on several research methodologies to map the current social inclusion mobility measures, as well as examine the needs and expectations around inclusive mobility.

According to the one of the reports published by this international consortium “Making mobility programmes more inclusive. Inclusive Mobility - From policy to inspiration”¹⁷, one of the first challenges the researchers of this subject faced was the lack of consensus on a definition of what is a disadvantaged student. Higher Education Institutions lack similar terminology, as well as data to be used in comparisons. National legal definitions and their implementation also vary across countries.

This lack of a shared definition and policies on what is a disadvantaged student can lead to a deficiency in measures targeting the group, or even in an incorrect identification of eligible students. Some countries rely on self-identification or documentation by the student, and in other countries, data and privacy can become obstacles to identifying groups and their needs.

This issue might be reflected in the percentage of disadvantaged students taking part in the programme, which is still low and has almost stagnated, with less than 7% of the mobilities of the Erasmus+ programme in 2020. The participation levels are even lower for students with overlapping disadvantages¹⁸.

Yet, several studies prove that disadvantaged students have the same motivations and are as interested in partaking in a mobility as their peers. Additionally, disadvantaged students have bigger personal and professional benefits as a consequence of the mobility. According to the European Parliament, only 24% of the non-Erasmus students declare that they are not interested in studying abroad¹⁹.

The barriers that these students face may vary according to their specific needs, but some are common to all groups. Finances, along with accommodation and language, are some of the common barriers. Students from lower socio-economic backgrounds also reported concerns in leaving their support networks, the impact of the mobility on their degree, and losing a paid job as additional barriers.

Although inclusive mobility strategies are typically institutional priorities, these also differ across countries and even Higher Education Institutions. The strategies depend on a series of aspects, such as societal values and national structures, the latter frequently lacking concrete actions and measures.

¹⁶ <https://plar4simp.inclusivemobility.eu/>

¹⁷ Making mobility programmes more inclusive. Inclusive Mobility - From policy to inspiration <https://inclusivemobilityframework.eu/Toolbox>

¹⁸ Making mobility programmes more inclusive. Inclusive Mobility - From policy to inspiration, p.11. <https://inclusivemobilityframework.eu/Toolbox>

¹⁹ European Parliament (2010), Improving the Participation in the ERASMUS Programme.

The report finally shares some additional recommendations towards the promotion of inclusive mobility, such as the following:

- Ensure a broad dialogue and consultation between national authorities, Higher Education Institutions, student and staff representatives and other key stakeholders;
- Have a clear definition, criteria, and recognition procedures of disadvantaged students established by Higher Education Ministries, agencies and institutions;
- Consider the inclusion of disadvantaged students in mobility programmes at a more central place in the national internationalisation strategy;
- Collect internationally comparable data about the participation of disadvantaged students in mobility programmes, agree on common targets, and monitor participation closely in different mobility programmes;
- Evaluate the impact of mobility on disadvantaged students and track their future employment activities.

The current statistics and barriers identified in this report show that further action is necessary to tackle the participation gap and provide an inclusive mobility experience to every student. This need has been emphasised in several processes and programmes.

The European Students' Union (ESU) has been observing and evaluating the implementation of the Bologna reforms since 2003, reflecting the main conclusions in the publications Bologna with Student Eyes (BWSE). The 2020 edition of Bologna with Student Eyes reiterates the lack of financing for internationalisation and mobility as "the most pressing issue". Tracking the same information from 2018, the report highlights that mobility remains a privilege for students that enjoy the necessary financial support from other sources, leaving prospective mobile students from lower socio-economic backgrounds behind. This evidences the fact that **the Erasmus scholarship amount is not enough to allow for the participation of any student in a mobility experience abroad**. In fact, the clear majority of all respondents to the survey launched by ESU indicated that financial difficulties are the number one consideration for students who would like to experience a learning mobility period but ultimately decide against it. Such difficulties are due to **the rising costs of living and studying**, combined with **the underfunding of the mobility scholarships**, which according to the report "are chronically insufficient and stagnant in comparison". It is still highlighted the particularly difficult situation of students studying in urban centers, who of course are even more affected by the rising cost of living.

Other major barriers cited were language barriers, failures in the support systems to accommodate and integrate students, and lack of recognition for studies abroad.

In fact, the report alerts that the **Erasmus+ programme is in immediate need of increased funding, both in order to ensure more equal access to it and to provide realistic support to reach the European wide target of 20% mobile students by the end of 2020**.

²⁰ https://esu-online.org/wp-content/uploads/2021/01/BWSE2020-Publication_WEB2.pdf

In order to widen participation, it is suggested to create targeted scholarships to be offered to students from underrepresented groups and one specific recommendation is given specifically for inclusion in mobility:

- increasing the general rate for all Erasmus scholarships to 500 EUR per month to make the system simpler, more transparent, and more accessible especially for students who have to work to cover their living costs.

The report globally concludes that without major increases in funding of Erasmus+ scholarships, lowering or mitigating the rising cost of living, it is likely that the situation that has been witnessed in the past years will persist.



THE ERASMUS+ SCHOLARSHIP SYSTEM

The Erasmus Programme was launched in 1987, with 11 European Programme Countries and 3,244 participants. The name of the programme was an acronym for European Region Action Scheme for the Mobility of University Students, but it also referred to Desiderius Erasmus of Rotterdam, a Dutch humanist and theologian known for travels because of work and study.

By the time the programme was created, the European Commission had already been supporting pilot student exchanges for around 6 years. Yet, there was a period of opposition and dispute from countries with their own student exchange programmes.

From the date of the Erasmus programme official launch to 2020, an estimate of around 11.7 million participants benefited from the scholarships.

The first European Citizen's Initiative²¹ regarding the Erasmus Programme ("Fraternité 2020 - Mobility. Progress. Europe.") was launched in 2012, with the goal of increasing mobility through the allocation of more EU budget, development of student's intercultural skills, and improved monitoring of the progress in this field. This initiative had limited success, but it was the first of its kind and already advocated for similar goals as those that are prominent nowadays, a decade after.

In 2014, the European Commission launched the Erasmus+ Programme, with a 40% budget increase and more ambitious goals. This programme combined all the previous European schemes for education, training, youth, and sport in only one programme, facilitating access to information and applications, with a positive impact on the number of participants increasing year after year. For example, until 2018 there was a total of 9 million participants (1987-2018) and until 2020 there were 11.7 (2018-2020), which is a growth of 2.7 million in two years. These numbers are impressive, considering the ones from 1987.

Due to its success and as preparation for the 2021-2027 plan, the European Commission has proposed to double the funds allocated to the programme in order to further expand it and promote inclusion, digitalization and green alternatives.

Since 2014, the Erasmus+ Programme, through its Key Action 1 (Learning mobility for individuals), has been supporting projects for Individual Mobility for Higher Education, mainly funding scholarships for students from any study cycle from a Higher Education Institution awarded with an Erasmus Charter for Higher Education and located in a Programme Country, or third countries not associated to the programme²².

The programme allows these students to carry out a mobility period in another institution, (or companies, in case of placements), with their achieved credits fully recognized at their home institution. The long-term mobility for studies has a reference duration between 2 and 12 months and students are exempted from tuition fees in the host institution.

The Erasmus for All Project addresses specifically student mobility within Programme Countries, currently code-worded KA131, which has different scholarship amounts from those for Partner Countries' student mobility (KA171).

Even though mobilities without scholarships (the so-called "zero-grant scholarships") are allowed and existent, under KA131, these are residual. There is a short list of figures publicly available, dating roughly ten years or older, but in 2012-2013 the European Commission indicated that zero-scholarship students represented around 2.5% of the total number of student mobility periods.²³ The highest numbers of zero-grant students were from France, Austria, Italy and Germany. Indeed, the vast majority of Erasmus students carry their mobilities with scholarships, which are awarded

²¹ The European Citizens' Initiative is a unique way for citizens to help shape the EU by calling on the European Commission to propose new laws. Once an initiative has reached 1 million signatures, the Commission will decide on what action to take.

²² For further information, see Erasmus+ Programme Guide Version 1 (2023): 23-11-2022, p. 33

²³ European Commission, A Statistical Overview of the Erasmus Programme in 2012-13, Luxembourg: Publications Office of the European Union, 2015, p. 50

to them by their home Higher Education Institutions. These scholarships are funded by the European Commission, through the National Agencies²⁴, to the Higher Education Institutions.

The mobility scholarship awarded by the Erasmus+ programme consists of a monthly rate, a base stipend with the amount varying according to the home and host country groups, as well as any of the eligible top-ups.

The mentioned groups divide the programme countries according to their level of living costs and, as per the Erasmus+ Programme Guide 2023²⁵, are the following:

Group 1 Countries with higher living costs	Denmark, Finland, Iceland, Ireland, Liechtenstein, Luxembourg, Norway, Sweden Third countries not associated to the Programme from Region 14
Group 2 Countries with medium living costs	Austria, Belgium, Cyprus, France, Germany, Greece, Italy, Malta, Netherlands, Portugal, Spain Third countries not associated to the Programme from Region 13
Group 3 Countries with lower living costs	Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, North Macedonia, Poland, Romania, Serbia, Slovakia, Slovenia, Turkey

The amount of the monthly rate is based on these three groups, and on which group the home country and the destination country are placed.

The EU Erasmus+ individual support scholarship provided to students will depend on their mobility flow between the sending and receiving countries of the student, as follows:

- mobility towards a country with similar living costs: students will receive the medium range EU scholarship;
- mobility towards a country with higher living costs: students will receive the higher range EU scholarship;
- mobility towards a country with lower living costs: students will receive the lower range EU scholarship.

The official table included in the Programme Guide by the European Commission establishes a range of amounts, as presented in the following table.

Higher Range Scholarship Applied to countries from a group with higher living cost	Medium range plus at least 50 € Between 348 € and 674 €
Medium Range Scholarship Applied to countries from a group with similar living cost	292 € to 606 € per month
Lower Range Scholarship Applied to countries from a group with lower living cost	Medium range minus at least 50€ Between 225 € and 550 € per month

²⁴ Each Erasmus+ National Agency is responsible for the direct management of the decentralized actions such as the Key Action 1.

²⁵ <https://erasmus-plus.ec.europa.eu/erasmus-programme-guide>

However, it is the responsibility of the National Agencies to annually define, for each country, either:

- a) Fixed amounts; or
- b) Ranges to be respected by the national Higher Education Institutions when defining the amount of mobility scholarships themselves.

For example, the Portuguese Erasmus+ National Agency has used fixed amounts since 2014 as this approach is considered to minimise potential situations of inequality between participants in the Portuguese context.

Currently, in the Erasmus+ Programme 2021-2027, the scholarship can have top-ups according to the student’s situation, as follows:

Students with fewer opportunities	250 € per month
Outermost regions and Overseas Countries and Territories to programme countries and Group 1, 2 and 3 Countries	700 € per month
Students and recent graduates carrying out traineeships	150 € per month

Where students and recent graduates with fewer opportunities are concerned, the criteria to be applied are defined at national level by the National Agencies in agreement with National Authorities. This, however, can introduce significant heterogeneity between how the different top-ups are applied in different countries, as well as between how ‘students with fewer opportunities’ is defined.

As an example, the Portuguese Higher Education General Administration provides students who benefit from social action scholarships with an additional complementary amount to be given during the mobility on a monthly basis. The amount can be €100 per month, if the calculated annual base scholarship is inferior to seven times the national social support index, or €150 per month, if the calculated annual base scholarship is equal or superior to seven times the national social support index.

In the particular case of students with fewer opportunities and/or from HEIs located in Outermost regions and Overseas Countries and Territories, the Programme grants travel support under KA131, which is a contribution to the cost of the travel that is measured by the Distance Calculator provided by the European Commission.

The amount for this travel support is the following (exclusive to the above-referred students):

Travel distances	Standard travel	Green travel
10 to 90 km	€23	
100 to 499 km	€180	€210
500 to 1 999 km	€275	€320
2 000 to 2 999 km	€ 360	€410
3 000 to 3 999 km	€530	€610
4 000 to 7 999 km	€820	
8 000 or more	€1 500	

Students who do not receive this travel support can also opt for green travel: they will receive a single contribution of €50 (unit cost) as a top-up amount and up to 4 days (per diem) of additional individual support to cover travel days for trips, if necessary.

Nonetheless, it is relevant to note that the awarding of the abovementioned top-ups and green travel support to mobile students must be ensured by Higher Education Institutions through their own financial sources. The budget awarded to a KA131 project by National Agencies is calculated based upon a number of regular mobility flows plus an average duration, both of which must be respected by HEIs. Hence, if HEIs intend to grant top-ups or green travel support, they must find alternative sources of funding, as they cannot use the budget that was awarded by the National Agency unless they reduce the number or duration of scholarships available to their students.

Overall, the programme is significantly wider, more inclusive and more complex when compared to other mobility programmes. Throughout its 35 years of existence, the programme has evolved and these features have gradually been introduced since the very first programme to the current one. An analysis of the evolution of the programme, particularly in respect to the scholarship amounts in the countries of this partnership, reveals a hugely different approach from country to country, as this is defined by each National Agency. This results in a totally different scenarios for students from different countries – even countries belonging to the same groups – and for students from the same country as well.



As it will be mentioned in the section dedicated to the Voice of the Students, this was precisely one of the aspects that was pointed out consistently by all the students that participated in the Student Social Labs organised by the project: they do not understand how the amount of the scholarship they receive is calculated, and they do not know where the information that could help them obtain their answers is available – or if it is available at all. This high level of uncertainty gains even more relevance in a context where the dependence on the existing funding is so clear, as highlighted in the Context and Relevance section before.

Within the scope of Erasmus+, National Agencies are given a high level of autonomy not only to define the scholarship amount for each of the three mobility groups, but also to decide on whether to mainstream the amount at national level for all HEIs or to grant them the autonomy to define their own amounts within the set range defined by the Agency.

In Portugal, the amount defined by the National Agency had no increase at all from 2014 to 2017 in any of the three groups of countries²⁶. Since 2018, there has been a continuous increase, particularly in 2019, that presented an average increase in the scholarship amounts of 19% – with the exception of the amounts in 2021, which were the same as in 2020. With each scholarship increase, all three groups were increased the same absolute amount. Every year, the three groups of countries had differentiated amounts that reflected the average living costs of the groups. The highest increase overall was of 23% in 2019 for mobility to a country with lower living costs: from € 235 in 2018, to € 290 in 2019.

In Hungary, the amounts defined by the National Agency have increased every two years. Since 2016, the maximum amount of scholarships in all groups was provided. In 2020, there was a merge of group 1 and 2. In group 1, the amounts increased 20% from 2014 to 2022. In group 2, the amounts increased 50% from 2014 to 2022. In group 3, the amounts increased 80% from 2014 to 2022.

²⁶ Annex 1 provides information on the evolution of Erasmus+ scholarship in different countries of the partnership since 2014

In Ireland, the amount defined by the National Agency had no increase at all from 2020 to 2022 in any of the three groups of countries. In 2018, the amount defined by the National Agency for countries in group 2 was reduced by 15%, and it was not until 2020 that it exceeded the 2017 rate for the first time. In the same year the rate for countries in groups 1 and 3 saw a very small increase.

In every case of scholarship increase, the percentage was higher in the mobility to countries with medium and with lower living costs, than to countries with higher living costs. The highest increase overall was of 35% in 2016 for mobility to countries with medium living costs: from 200€ in 2015 to 270€ in 2016.

In France, the National Agency defines a set range for each country group, and the HEIs define their own amounts within the set range. Between 2014 and 2017, the set ranges for country group 2 and 3 were equivalent. The ranges increased in 2018 (an average increase of 32% for minimum amounts, and of 47% for the minimum amount of country group 2) and in 2021 (average increase of 17% for minimum amounts).

As for Italy, the amount defined by the National Agency had no increase at all from 2014 to 2017 in any of the three groups of countries (Country group 2 and Country group 3 were only one group until the new Erasmus plus Programme 2021/2027). Since 2018, there has been one increase (with the same amount) for all groups, resulting in a higher percentage increase in the mobility to countries with similar and with lower living costs, than to countries with higher living cost. The highest increase overall was of 23% in 2021 for mobility to country with middle and higher living cost: from €250 in to €300, and from €300 to €350.

According to the information provided by the partner institutions of this project, the situation has not been as positive in other countries. For example, in Spain the amount of the scholarship was stagnant until 2021, at which point it was only increased by 3% in all the mobility groups.

According to the literature review, and as already introduced in the Context and Relevance section of this Report, there is an agreement that financial barriers are one of the main, if not the foremost, reasons for low application levels (Souto-Otero et al, 2013: 71)²⁷.

A news piece from Science Business²⁸ highlights that the new programme has already faced some issues during its first year, as Higher Education Institutions received a lower budget than in the previous programme 2014-2020. This had a negative impact on students intending to have an Erasmus experience, increasing their economic uncertainty due to the reduction of mobility scholarships. The conclusions that emerged from the Student Social Labs organised within the scope of this project highlighted the extreme importance of concrete information being shared and accessible to potential mobile students before they make the decision of applying to a mobility scholarship. The students' uncertainty about the scholarship amount they will receive significantly lowers the level of trust in the process and consequently decreases the chances of students deciding to undertake a mobility period. This issue will be again addressed later in this report, in the section Considerations for a More Inclusive Scholarship Formula.

²⁷ Souto-Otero M. et al. (2013), Barriers for International Student Mobility: Evidence from the Erasmus Program, Educational Researcher, Vol. 42 No. 2, pp. 70-77. Doi: 10.3102/0013189X12466696

²⁸ <https://sciencebusiness.net/news/rocky-start-new-erasmus-programme-2021>

OTHER FUNDED MOBILITY PROGRAMMES AND THEIR SCHOLARSHIP SCHEMES

Erasmus for All project members have identified a sample of 19 funded mobility programmes and/or scholarships for comparison against the Erasmus mobility programme funding model. Features for comparison included the financing, target participants, scholarship duration and amount, application process, scholarship amount calculation, application criteria, selection criteria, eligible costs, compatibility with other scholarships, and conditions for termination. The direct aim of this research was to directly compare the Erasmus+ programme and other funded mobility programmes, identifying such programmes and explaining how the scholarships are awarded to participants. The indirect aim was to identify features that could be potentially interesting to consider during the stage of developing alternative grant calculation methodologies.

> Financing and duration

The majority of the sampled mobility programmes are funded by public or semi-public bodies, for example universities' own funds in the 'Overseas' programme financed by the University of Bologna and the 'Global Mobility Bursary' financed by Trinity College Dublin. The US Department of State funded Fulbright Schuman Programme and French Ministère de l'Enseignement et de la Recherche 'Aide Mobilité Internationale Etudiante' programme were also included in the group of mobility programmes mapped. An example of privately funded programmes included are the 'Bolsas Ibero-Americanas' funded by Santander Bank and the 'Postgraduate Fellowships Abroad' funded by La Caixa Foundation. In terms of scale of scholarships, there is no comparison to the Erasmus+ mobility programme, which delivers hundreds of thousands of grants per year²⁹. The scholarships reviewed range from 2-150 awards given annually, and many programmes award numbers vary or were not available.

The mobility duration for the programmes sampled ranges from 4 weeks (Young Researchers Grant & Study of the U.S. Institutes for Student Leaders) to 2 academic years (Bourses IDEX), with 6-9 months being the average mobility duration.

> Application process

The application processes for these programmes are managed by their financier or at the HEI level. Students apply to these mobility programmes usually through an online application, and some requiring good performance at an interview. For the La Caixa Foundation Postgraduate Fellowships Abroad programme, students are pre-assessed and then invited to an interview where they are assessed for: candidate's potential (40%), motivation and impact (30%), academic and professional background (30%). This longer process may account for the fact that the awardees receive funding for university programme tuition with no limit, a monthly allowance of €1400 for Eurozone locations, an initial settling in allowance, travel expenses, returning expenses, application fees for up to 5 institutions, and insurance.

²⁹ https://ec.europa.eu/commission/presscorner/detail/en/IP_21_6836

> Application criteria

Application criteria for the mobility programmes vary, touching on a range of categories: language proficiency, level and/or year of enrolment in degree programme, location of previous study, location of host destination, recognition of host credits, nationality and/or residency status, age, area of study or expertise, and receipt of other grants. Only one of the 19 mobility scholarships reviewed required students to meet certain socio-economic conditions to apply, which is the Aide Mobilité Internationale Etudiante financed by the French government. To be eligible to apply for this scholarship, students must be enrolled in a BA, MA, or PhD programme and in receipt of a ministry grant on socio-economic criteria. The Trinity College Global Bursary fund application, while open to all Trinity outbound students going to a non-Erasmus programme country, requires applicants to report if they are in receipt of the 'Student Universal Support' grant (SUSI), an Irish government grant that is issued to economically disadvantaged students. These students are then prioritized in the Trinity College Global Bursary distribution.

> Selection criteria

Academic performance and subject area and/or project relevance feature often on the selection criteria for the scholarship candidates, along with student's motivation, references, leadership potential, and extracurricular activity. Four out of the 19 programmes consider socio-economic factors in their selection criteria: Bolsas Ibero-Americanas - Santander, Mobility for Students - Fondo Giovani, Global Mobility Bursary - Trinity College Dublin, and Aide Mobilité Internationale Etudiante. For Aide Mobilité Internationale Etudiante, all students who meet the application criteria, which require receipt of an economic needs-based grant, receive the scholarship.

The Aide Mobilité Internationale Etudiante uses the students' familial tax assessment notices in order to determine eligibility and also the amount of funding that will be made available by grouping students and their families into different levels of need. While relatively straightforward for those submitting a French tax assessment notice to another French authority, the procedure is complicated for those whose families are not fiscally resident in France.

For the Bolsas Ibero-Americanas - Santander, the universities that take part in the scheme are responsible for verifying compliance with the scholarship requirements and rely on the individual student's personal socio-economic data that is available in the University's own databases. It assumes that the University collects the particularly sensitive personal data of the applicants, including any certificate or documentation that the University considers as necessary, in accordance with the personal data protection regulations in force at the time.

The Fondo Giovani funding, is administered by the universities that take part in the programme. It categorises students based on their economic need by examining the ISEE-U (Equivalent indicator of the economic situation for University). The ISEE is an official indicator of the economic condition of a family and it is issued by the INPS (Italian National Social Security Institute) for those with income and assets in Italy. Once again, international students not fiscally resident in Italy have additional obstacles to overcome to gain access to this funding.

The Trinity College Dublin Global Mobility Bursary is an institution specific programme. The only criterion for eligibility is that a student is undertaking a mobility to a non-Erasmus programme country. The criteria to be eligible for a top up out of economic need is based on the student's status as a recipient or not of the Irish government's SUSI scholarship (Student Universal Support). Since SUSI is not issued to students whose families are not resident in the EEA, international students in Trinity are unable to apply for the supplementary top up to the bursary. The university relies on the data it has on file for each student to administer this bursary.

Bolsas Procultura - Aulp has other quotas that are used in the selection process. For this scholarship, the selection is made so that an equal distribution of gender, origin country, and culture-related subject areas is met.

Another notable selection criterion, used by the Study of the U.S. Institutes (SUSIs) for Student Leaders - Fulbright Portugal, is the consideration of a student's previous travel experience and prioritisation of students who have had few or no opportunity to previously travel abroad.

Scholarship amount calculation & eligible costs

Calculation & distribution trends: There are a few trends that can be seen from the scholarship amount calculations of the various mobility scholarships. Firstly, some programmes provide a lump sum of a fixed amount for all participants with no specified calculation or terms of use. Sometimes this sum is given in monthly instalments, otherwise it is distributed in a single sum. Other scholarships provide travel cost and/or monthly stipend that vary depending on host country, similar to the Erasmus programme. Whether a monthly stipend or starter lump sum, the majority of these scholarships do not require students to report on their spending. There are also scholarships that cover specific costs that students report, such as travel costs, tuition fees, and housing.

Economic factors used in calculation: There are three scholarships where the funds vary depending on the economic status of student, Fondo Giovani - Ministry of Education, Overseas - University of Bologna, and the Global Mobility Bursary - Trinity College Dublin. For the Global Mobility Bursary, students who report receipt of the Irish 'Student Universal Support' grant (SUSI) receive 20-25 percent more than the students who are not in receipt of the SUSI grant. The Fondo Giovani grant issues a top up to the monthly stipend based on the students' economic situation. The top up is divided into 3 categories based on the students' family incoming (ISEEU): ISEEU > €50,000 don't receive a top up, ISEEU €30,000 to €50,000 receive €100 per month top up, and ISEEU €15000,00 to €30,000 receive €200 per month top up, and ISEEU ≤ €15,000 receive €300 per month top up. In the Overseas programme, the monthly contribution cost is set at five fixed amounts based solely on the students ISEEU, ranging from €850 per month to €350 per month. Students in the lowest family incoming bracket receive more than double the students in the highest family incoming bracket.



Calculation by destination: Similar to the Erasmus+ programme, several of the sampled mobility programmes calculate the grant amounts based on the location of the mobility destination. Nordplus Higher Education Programme - long-term student mobility - has three different rates for the travel costs based on countries travelling to and from, while the monthly stipend offered is the same for all participants. The La Caixa Foundation has three different monthly allowances offered based on destination location: EHEA, Asia-Pacific, and North America. The Fondo Giovani programmes grant universities a high level of autonomy in deciding funding criteria, provided that they consider merit and socio-economic condition. Mobility towards a country with high living costs range between €450 and €850 per month. Mobility towards a country with medium living costs range between €400 and €800 per month. Mobility towards a country with lower living costs range between €350 and €750 per month.

Termination

For most of the mobility programmes, termination of the programme can occur if participants do not comply with their contract or force major. For example, for the 'Overseas' programme at the University of Bologna, in order to maintain their financial contribution, students must spend at least three months at the partner university on a one-semester exchange, and at least eight months on a full-year exchange. If they fail to do so, they will have to pay back the financial contribution they received. Students also must complete at least one transferable learning activity per semester or quarter, otherwise they must pay back the financial contribution they received.



THE VOICE OF OUR STAKEHOLDERS

THE STUDENTS

Each partner Higher Education Institution of the Erasmus for All project organised and ran at least one Student Social Lab during the first stage of the project's implementation. The ESU also ran their own Lab. The purpose of the labs was to gather the views of our most important stakeholders, the students. As a hands-on initiative, students who had recently concluded their Erasmus+ mobility, or in some cases, students who were currently on their mobility in one of the programme countries were invited to consider the variables that need to be taken into consideration with regards to the current, as well as a possibly different future, scholarship system.

By attending the labs, students moved from being passive stakeholders to co-designers and joint decision makers of the new Erasmus+ scholarship proposal. In line with the overarching priorities of the Erasmus+ Programme, this fostered active citizenship and a sense of belonging to the European project through their inclusion in the decision-making process. The students' contributions have been a valuable input into developing a base of material evidence in order to support the creation of an improved scholarship calculation methodology and a more inclusive scholarship system. These local events were vital for allowing the project to listen to the students' voices and, thus, to ensure that a reality-based and co-designed solution would come about later in the project.

The first round of the Erasmus for All Student Social Labs was held in May and June of 2022, having some of the partners organised a second round in October during the celebrations of the #ErasmusDays. During these events, students could share their experiences, perspectives and lessons learnt.

Students were recruited to take part in these discussions on a voluntary basis, invited to join in-person (though in some instances participants were involved virtually using videoconferencing platforms).

To disseminate the events, the organisers relied on using student facing communications channels (emails, websites, social media) to promote the labs and drive student engagement. Additional efforts were made to include students with fewer opportunities, particularly economically disadvantaged students, and in some cases, students were individually, directly invited due to their particular criteria. Students who participated in the Student Social Labs were awarded a certificate of attendance acknowledging their valuable contributions.

The goals of the labs were twofold:

1. To discuss the impact of the Erasmus+ scholarship on the students' mobility experience, while finding out whether it has been decisive on encouraging them to undertake a mobility.
2. To introduce the Erasmus for All project to this key stakeholder group.

The labs were organised in a round-table format to promote discussion, and the participants were guided by moderators who have a background in mobility management (for example International Relations Officers).

After a brief presentation of the Erasmus for All project's goals and tasks, the moderator was able to discuss the topics in hand with students in groups of approximately 10. The students gathered were from various relevant profiles:

- Outgoing Erasmus+ Programme students that went to high, medium and low-income countries.
- Incoming Erasmus+ Programme students that came from high, medium and low-income countries.
- Non-Erasmus+ Programme outgoing students, or those outside any organised exchange programme, that went to high, medium and low-income countries.

- Non-Erasmus+ Programme Incoming students, or those outside any organised exchange programme, who came from high, medium and low-income countries.

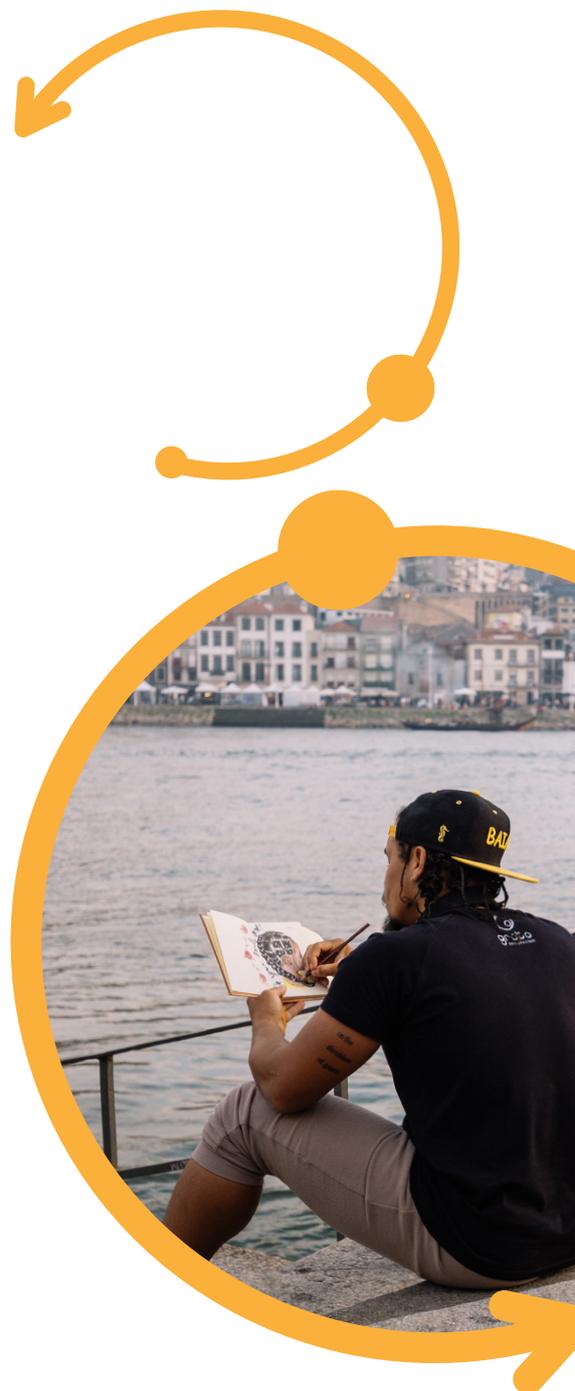
- Students who haven't undertaken a mobility but are/were interested in doing so.

This selection of students ensured that the opinions were well-grounded in the matters of fact related to the subject in hand. In some cases, other relevant stakeholders also participated in the Labs, for example, academics from the multi-disciplinary team that will work on the development of the alternative scholarship calculation methodologies and senior International Officers at Faculty level.

Feedback from student participants, gathered by the submission of a post-lab quality questionnaire, **revealed that they had acquired a sense of empowerment and ownership regarding the decisions needed to construct of a quality European Higher Education Area; a consolidated European identity; and enhanced civic engagement.**

Each institution nominated a rapporteur to gather all the notes, feedback, and conclusions on the topics that were discussed, and these included:

- Impact of the Erasmus+ scholarship.
 - Its capacity to act as a 'push factor' when deciding to go on a mobility.
- Issues regarding the Erasmus+ scholarship.
 - Whether or not it covered a reasonable amount of mobility related costs.
- Proposals of changes and adaptations to the Erasmus+ scholarship.
 - Which factors should be taken into account when calculating the scholarship.



After assembling the different student viewpoints in the Student Social Labs, the following are the top ten main conclusions that were drawn:

1. Students generally only have a superficial knowledge of the Erasmus+ scholarship and do not know how it is currently calculated.
2. The Erasmus+ mobility scholarship is indeed a relevant motivating factor that encourages mobility.
3. Students do consider the mobility scholarship and how it varies when making their choices concerning destination and duration of mobility. However, the students' choices are influenced to a more or less greater extent depending on other factors such as academic prestige, housing availability, or personal socio-economics circumstances.
4. Many students questioned the rationale behind the three income-based country groupings, highlighting the lack of information that is publicly available on this issue.
5. The timing of scholarship payments can have serious knock-on effects, and many significant costs arrive upfront in the mobility, for example housing deposits.
6. Distance was identified as an additional factor that ought to be considered together with scholarship calculation. The point was made that travelling from/to a remote and isolated part of a country is not equivalent to travelling from/to a large urban centre or capital, and the currently existing top-ups only consider specific regions classified as "outermost regions".

7. The idea of a more nuanced scholarship indexed to regional costs of living, and also perhaps purchasing power at home, was very popular among the students. An additional suggestion was to link the scholarship amount to the local minimum wage/poverty threshold. However, students were conscious of the need to have a scholarship application process that was easily managed and did not represent a costly administrative burden. They acknowledged that the variety of family and personal situations students have would lead to a far more complex system if everything is to be taken into account. The students believed it was difficult to gather some socio-economic information (e.g. household income) in a standardised way for it to be a formal criterion.

8. All students agreed that if financial worries were lessened or removed entirely by the scholarship then the mobility itself would be a more enriching academic and personal experience. This would open up further social opportunities that many felt deprived of. In an ideal scenario many students would like the scholarship to cover all mobility related costs, but generally agreed on the current definition of covering the difference between the costs of living of home and host institutions.

9. Overall students have converged in the opinion that a better adapted scholarship with rates that were higher and more adjusted to the actual costs of a mobility would provide the opportunity for more students to take part in it.

10. Regarding the use of inclusion top ups, some students felt that the criteria used were overly vague and inconsistent.

THE EUROPEAN ALLIANCES

The Erasmus for All project was invited to participate in the Campus of European Universities event, held in Versailles on June 30th 2022. This opportunity had an extremely positive impact on the project's dissemination while allowing the partnership to gather relevant input from representatives of the European University Alliances concerning their perception on the Erasmus+ mobility.

In particular, the partnership was interested in getting to know the Alliances' view on the same topics that were addressed with students that participated in the Student Social Labs. Through a small survey conducted to representatives of the Alliances during and immediately after the event, the following issues were tackled:

- The impact of the Erasmus+ scholarship on the student's decision to carry out a mobility;
- The factors that should be considered to determine the Erasmus+ scholarship for each student;
- The definition of the Erasmus+ scholarship.

The survey was made available in the Erasmus for All official website. It included four questions, and had a total of 40 answers³⁰ received between the 30th of June and the 25th of August 2022.

The analysis of the results of this survey leaves absolutely no room for doubt that **the Erasmus+ scholarship has a clear impact in students' decisions to partake in a mobility period**, as 100% of the respondents considered it to be a factor with medium to high impact, and from these, 83% considered it being a factor with high or with the highest impact for the overall decision by the student.

Representatives of the Alliances were also asked about their perception concerning what impact **an improved scholarship methodology would have in increasing student participation in the programme**. Answers to this question reveal a more heterogeneous position, but the great majority of respondents (98%) consider it would **certainly have an impact, with 75% considering such impact to be high or very high**.

Both answers were extremely important to the Erasmus for All project as they allowed the partnership to corroborate the relevance of the project as well as the need to propose a change in the current methodology to allow an increase of the student participation in the Erasmus+ mobility. The following questions were relevant for the partnership to receive the Alliances' representatives' views on the direction that such change proposal should take for it to be effective and meet the existing needs.

In this context, the partnership wanted to know about the factors that should be considered to determine the amount of the scholarship of a student, among the below-listed possibilities, being the possible answers "yes" or "no":

- An economically disadvantaged situation
- The cost of living of the host city
- The cost of living of the host country
- The cost of living of the sending city
- The cost of living of the sending country

³⁰ Survey was circulated among representatives of the 41 Alliances



The most interesting conclusion was that **the factor selected by the highest percentage of respondents was the cost of living of the host city (85%)**, which represents an extremely important indication for the Erasmus for All team of experts to mastermind the new alternative scholarship calculation methodology. Indeed, for years the factors that were considered for the calculation of the scholarship were country-based, and not city-based. Yet, **the considerable differences in the living costs of different cities inside the same country are undeniable**, and with the current formula leading to significantly unequal situations. It was also interesting that respondents still considered the cost of living of the host country (55%) being more important than the cost of living of the sending city (17.5%) or country (5%).

In regards to the student's economic situation, a relatively high percentage (67,5%) of respondents indicated that this should be one of the factors considered for the new scholarship calculation methodology.

On the final question, it was relevant to understand whether the Alliances' representatives considered that the current definition of the Erasmus+ scholarship should be maintained, i.e. whether they considered that it should cover the approximate difference of costs between the home and the host locations, or other. A total of 90% of the respondents considered that it should cover at least 75% of the costs, and 60% of the total considered it should in fact cover 100% of the costs.

All the conclusions of the different consultations done to these stakeholders constitute extremely valuable base ground information for the work to be developed in the following phases of the project, namely for the development of the alternative scholarship calculation formula.

The next section of the report presents the main considerations that have been drawn thus far by the multidisciplinary team of experts that will develop the alternative formula

CONSIDERATIONS FOR A MORE INCLUSIVE SCHOLARSHIP FORMULA

In the period dedicated to the development of Project Result #2 “Guidelines for a more inclusive scholarship calculation formula”, a multidisciplinary group of experts will design three scholarship schemes with a view on increased participation in mobility of all students. These scholarship schemes will be tested across a group of students in different partner HEIs of the project. Therefore, based on what we have learned in these first project results, we compiled some desirable characteristics of the scholarship scheme for development in Project Result #2:

1 - In order to promote higher student participation, the scholarship scheme itself should be:

Financially Sufficient for Students - the scholarship should aim towards covering all the mobility extra expenses and being experience-enhancing.

Geography-Based - The scholarship rationale should account for origin and destination countries and cities of the student.

Financially Sufficient for HEIs - HEIs should be granted enough financial resources to be able to keep up with a higher student participation.

Granular - Students’ features and needs of different nature should be considered and accounted for in the scholarship scheme.

2 - The scholarship should also look for other desirable (non-financial) properties, such as:

Certain - Students should know as soon as they apply or immediately after they apply the amount of scholarship that they will receive.

Timely - Students should not be requested to put their own money in advance.

Transparent - Students should be able to understand easily when, how much and why they will receive their scholarship.

Simple - Students and HEIs should be guaranteed to have a minimum/reduced amount of bureaucracy needed to participate - such as reporting expenses and asking for invoices.

Perceived as fair - All students, both disadvantaged and not-disadvantaged, should agree that the scholarship scheme is fair across all students.

Generalised - The scholarship should be applicable between different countries and realities within the Programme Countries.

If there are variable scholarship amounts depending on the student being disadvantaged or not, the expert groups should propose an identification method that may be fit for the purpose. Ideally, the method should be:

Costless - Disadvantaged students and institutions should not waste significant resources in proving and assessing whether every student is disadvantaged or not.

Effective - Disadvantaged students and other students should be distinguished correctly.

Granular - If there are different types of disadvantages, they should all be covered or distinguished in a way that disadvantaged students feel included and treated fairly.

Typically, these objectives cannot be attained at the same time. The expert team should consider them in the creation of possible grant calculation scenarios, and after the decision of the consortium, test the final one(s) and compare them to the Erasmus+ current scholarship scheme. In the testing phase, the team should be able to evaluate whether their assumptions regarding these characteristics are met by students and institutions alike, by comparing those students funded by Erasmus+ scholarships, according to the rules in force, with those funded by the Erasmus for All proposal(s) in each country.

However, it has to be noted that the effort to establish a comparison between the Erasmus+ scholarship and the scholarship proposals that are to be crafted in PR2 (and tested in PR3) can be challenging, because currently National Agencies have an important role in establishing the scholarship mobility conditions in each country, at least in three properties:

1 - National Agencies establish the actual amount given by institutions for the three types of destination countries, or even delegate the definition of the scholarship amount to HEIs. The defined range by Erasmus+ is sufficiently wide for countries to have significant heterogeneity.

2 - National Agencies establish the criteria to be used in the top-ups for students with fewer opportunities. This means the additional €250 per month foreseen in the scholarship can be more easily awarded in some countries than others as well as it can be subject to different levels of burden (e.g. providing proof of disadvantage condition). Thus, the current system is leading to considerable discrepancies in the way this is being implemented across Programme Countries.

3 - National Agencies set up the project funding scheme (and eventual country-specific conditions) to which institutions can apply. This potentially causes situations of delay of payments to institutions (thus compromising the scholarship payment to the students in due time); partial coverage of the mobility scholarship (given that the months funded vary from project to project and ongoing projects with different minimum funding days create a differentiation between students in mobility during the same academic year); and non-inclusion of a set of spending categories in the project (such as the top-ups).



CONCLUSIONS

Erasmus+ is the world's leading mobility programme. Despite its resounding success, which ought rightly to be celebrated, the Bologna Process, the creation of the EHEA, and the European Universities initiative have all brought about a situation where the Programme must continue to evolve and adapt, especially **considering the political desire to increase participation rates**. Taking into consideration the numerous reports and studies that have also demonstrated that **the Erasmus+ Programme is failing to live up to its ambition to be adequately inclusive**, more must be done to reduce the barriers to mobility. Since **the primary obstacle being reported is an economic one**, it is evident that **a more just grant calculation methodology is required for a more economically viable scholarship scheme**, so that people from all socio-economic backgrounds avail of the opportunities that mobility provides. While the subtleties that underly lower participation of students from a disadvantaged background are complex and manifold, **one lever at our disposal to respond to this is to eliminate or at least considerably reduce the economic obstacle the mobility involves**. This is even more relevant in the current economic climate where Europe is facing a cost-of-living crisis, and a plurality of students are reporting issues with covering their day-to-day expenses, both at home and while on a mobility.

The comprehensive research of similar initiatives and projects that focus on the same topic has shown that there are many factors involved in the decision to take part in a mobility programme but also in the decision not to do so. Financial burden is consistently seen as the main obstacle to mobility, with other factors such as separation from family and friend networks, or loss of economic opportunity (e.g., part time work in their home country) being secondary to the actual cost implications of participation. When factors overlap, participation rates are even lower. Those working in the sector have expressed that **a baseline minimum scholarship of €500, with additional top ups available for certain categories would go a long way to encourage students from all backgrounds to consider this opportunity**. This is echoed by students in the ESU's Bologna With Student Eyes 2020 report.



There has been some progress regarding the participation of students having a socio-economic disadvantage (though it is uneven across Programme Countries), yet this progress has stagnated in increasing the participation rate of such students. Currently, there is a lack of consensus on an agreed definition for ‘disadvantage’ itself, which can lead to a situation where target groups are overlooked or there is an additional burden placed on them to self-identify and provide evidence for their situation.

Considering the current economic climate, it is possible to conclude that **without a significant increase in the funding of the Erasmus+ Programme the same findings will continue to be reported.**

No other programme comes close to the scale and impact that Erasmus+ has, with the other programmes revised ranging from 2 to 150 grants awarded annually. That said, despite its clear frontrunner status, issues with reduced budgets have meant that **the new 2021 - 2027 edition of the Programme has gotten off to a shaky start.**

Nineteen other funded mobility programmes were studied. The financing, target participants, scholarship duration & amount, application process, scholarship amount calculation methodology, application criteria, selection criteria, eligible costs, compatibility with other scholarships, and conditions for termination, were all of the criteria that were used to compare the programmes and the methodologies involved. This comparison tells us that in most cases mobility programmes are funded by public or semi-public bodies. There is little distinction to be made based on the duration of funded mobility periods, with most being based on traditional semesters. Eligibility criteria are also broadly consistent across the different schemes with a combination of language proficiency, level and/or year of enrolment in degree

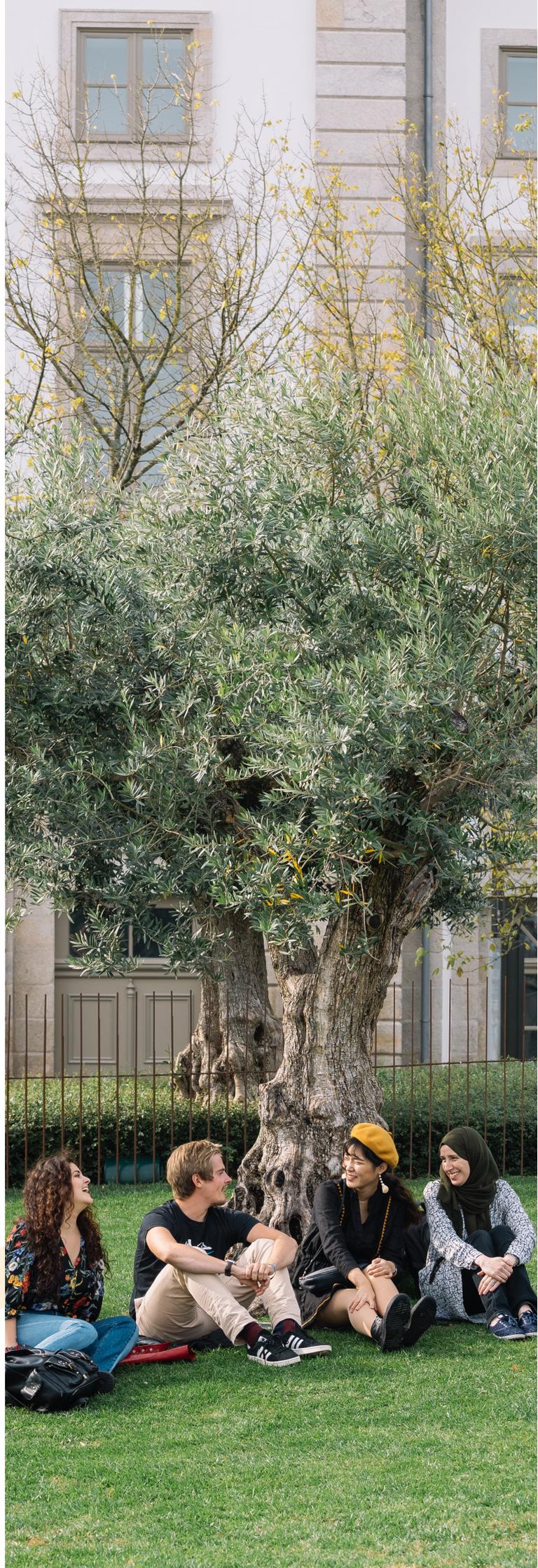
programme, location of previous study, location of host destination, recognition of host credits, nationality and/or residency status, age, area of study or expertise, and receipt of other grants often being the determining factors for eligibility. Only one scheme studied had specific socio-economic conditions pre-application. Selection criteria for the award of grants often rely on academic performance in combination with other elements such as motivation and extracurricular activities. Only four do take into consideration socio-economic criteria in selection. In those cases, it is necessary to process familial tax records or other particularly sensitive personal data. In one instance quotas are applied during the selection process so that desired distributions of socio-economic categories are achieved, and in another previous travel experience determines a student’s priority in receiving a grant. The calculation of the grant amount to award is either based on a lump sum fixed amount, or can vary depending on the host country similar to Erasmus+. When the grant amount varies based on socio-economic criteria students are generally classified based on their familial tax records. The primary result to draw from the identification and mapping of other scholarship programmes is that, in many respects, Erasmus+ really is the only game in town.

The collection of valuable student stakeholder input during the Student Social Labs has allowed us to draw the conclusion that scholarships act as a ‘push factor’ motivating students to participate in a mobility. Having said that, a certain number of students have only a superficial knowledge of grant programmes like Erasmus+. While each student’s own personal criteria determine their choice of destination and the duration of their mobility, cost of living and the supports available do enter into the equation. For many students the current grouping of countries by the Erasmus+ Programme into three cost of living categories was not clear. Additional issues

identified by students relate to the problems that late payments and bureaucracy create for them. As one of the main conclusions that should be highlighted, **students reacted well to the suggestion of a more nuanced scholarship system that would be more tailored to their socio-economic circumstances and the conditions in play at their destination.** Opinions converged that **a better adapted scholarship with rates that were higher and more adjusted to the actual costs of a mobility** would provide the opportunity for more students to take part in a mobility and that the experience would be more enriching academically and personally with less of a financial burden to worry about. A small survey of **European University Alliance representative stakeholders** echoed many of these conclusions, especially around scholarships acting as **a push factor and the need for improvements in grant schemes** to be made, with a consensus that **the cost of living in the host city is a factor that deserves attention.**

The work that underpins this report allows us to make some preliminary considerations for a more inclusive scholarship formula. There is merit in the second project result exploring a baseline grant amount that may be adequate for all participants. **The grant itself should be financially sufficient to cover at least the extra expenses for being abroad.** Beyond methodological and financial improvements, there should be due consideration given to other areas for improvement in the grant, for example issuing payments in a timely fashion, and the grant being easy to administer.

Through the work to be implemented within the scope of this project, we hope to **tackle the low levels of participation in the Erasmus+ Programme by proposing a more economically inclusive scholarship scheme,** thus contributing to the future strength of the world's leading mobility programme.





ACKNOWLEDGEMENTS

This work has been possible thanks to the funding granted by the Erasmus+ National Agency Education and Training in Portugal through the Erasmus+ Programme, whose relevance and potential have been acknowledged since its creation in 1987. All partners are grateful to the European Commission for the implementation of the Erasmus+ Programme, and this project intends to positively contribute to achieve its ever-growing success.

The authors would also like to thank to all the students and stakeholders who have accepted to voluntarily participate in the Student Social Labs, expressing their views and opinions concerning Erasmus+ and sharing their personal experiences as participants or managers of this mobility Programme.

A special word also to the representatives of the European Alliances that accepted to contribute to the survey that circulated within the context of the Campus of European Universities event, and whose views allowed the partnership to gather relevant information concerning one of the most relevant stakeholders.

And last but not least, the partnership would like to thank all external speakers of the first multiplier event of the project “Is the new Erasmus for all? Proposals towards a more inclusive Erasmus scholarship”, which intended to share with external public the main outcomes of the first stage of activities developed within the scope of this project and particularly this Report. All speakers have definitely contributed to enrich the event and allow the Erasmus for All project to be widely promoted among relevant stakeholders.

ANNEX 1

Evolution of the Erasmus+ scholarship in different countries of the partnership (student mobility for studies)

France³¹

	Country group 1		Country group 2		Country group 3	
	FR NA Range	EC range	FR NA Range	EC range	FR NA Range	EC range
2014	200-300	250-500	150-250	200-450	150-250	150-400
2015	200-300	250-500	150-250	200-450	150-250	150-400
2016	200-300	250-500	150-250	200-450	150-250	150-400
2017	200-300	250-500	150-250	200-450	150-250	150-400
2018	270-370	270-520	220-320	220-470	170-270	170-420
2019	270-370	270-520	220-320	220-470	170-270	170-420
2020	270-370	270-520	220-320	220-470	170-270	170-420
2021	310-600	310-600	260-540	260-540	200-490	200-490
2022	310-600	310-600	260-540	260-540	200-490	200-490

Hungary³²

	Country group 1		Country group 2		Country group 3	
	Amount HU NA	EC range	Amount HU NA	EC range	Amount HU NA	EC range
2014	500	250-500	400	200-450	300	150-400
2015	500	250-500	400	200-450	300	150-400
2016	500	250-500	450	200-450	400	150-400
2017	500	250-500	450	200-450	400	150-400
2018	520	270-520	470	220-470	420	170-420
2019	520	270-520	470	220-470	420	170-420
2020	520	270-520	520	220-470	470	170-420
2021	520	310-600	520	260-540	470	200-490
2022	600	310-600	600	260-540	540	200-490

³¹ Source: French National Agency Erasmus+ Education and Training

³² Source: Hungarian National Agency

Ireland³³

	Country group 1		Country group 2		Country group 3	
	Amount IE NA	EC Range	Amount IE NA	EC Range	Amount IE NA	EC Range
2014	250 €	250 – 500 €	200 €	200 - 450 €	200 €	150 – 400 €
2015	250 €	250 – 500 €	200 €	200 - 450 €	200 €	150 – 400 €
2016	270 €	250 – 500 €	270 €	200 - 450 €	220 €	150 – 400 €
2017	270 €	250 – 500 €	270 €	200 - 450 €	220 €	150 – 400 €
2018	280 €	270 – 520 €	230 €	220 - 470 €	230 €	170 – 420 €
2019	300 €	270 – 520 €	250 €	220 - 470 €	250 €	170 – 420 €
2020	350 €	270 – 520 €	300 €	220 - 470 €	300 €	170 – 420 €
2021	350 €	310 – 600 €	300 €	260 - 540 €	300 €	200 – 490 €
2022	350 €	310 – 600 €	300 €	260 - 540 €	300 €	200 – 490 €

Italy³⁴

	Country group 1		Country group 2		Country group 3	
	Amount IT NA	EC Range	Amount IT NA	EC Range	Amount IT NA	EC Range
2014	280 €	250 – 500 €	230 €	200 - 450 €	230 €	150 – 400 €
2015	280 €	250 – 500 €	230 €	200 - 450 €	230 €	150 – 400 €
2016	280 €	250 – 500 €	230 €	200 - 450 €	230 €	150 – 400 €
2017	280 €	250 – 500 €	230 €	200 - 450 €	230 €	150 – 400 €
2018	300 €	270 – 520 €	250 €	220 - 470 €	250 €	170 – 420 €
2019	300 €	270 – 520 €	250 €	220 - 470 €	250 €	170 – 420 €
2020	300 €	270 – 520 €	250 €	220 - 470 €	250 €	170 – 420 €
2021	350 €	310 – 600 €	300 €	260 - 540 €	250 €	200 – 490 €
2022	350 €	310 – 600 €	300 €	260 - 540 €	250 €	200 – 490 €

³³ Source: Irish Higher Education Authority

³⁴ Source: National Agency Erasmus+ Indire

Portugal³⁵

	Country group 1		Country group 2		Country group 3	
	Amount PT NA	EC Range	Amount PT NA	EC Range	Amount PT NA	EC Range
2014	280 €	250 - 500 €	230 €	200 - 450 €	230 €	150 - 400 €
2015	280 €	250 - 500 €	230 €	200 - 450 €	230 €	150 - 400 €
2016	280 €	250 - 500 €	230 €	200 - 450 €	230 €	150 - 400 €
2017	280 €	250 - 500 €	230 €	200 - 450 €	230 €	150 - 400 €
2018	300 €	270 - 520 €	250 €	220 - 470 €	250 €	170 - 420 €
2019	300 €	270 - 520 €	250 €	220 - 470 €	250 €	170 - 420 €
2020	300 €	270 - 520 €	250 €	220 - 470 €	250 €	170 - 420 €
2021	350 €	310 - 600 €	300 €	260 - 540 €	250 €	200 - 490 €
2022	350 €	310 - 600 €	300 €	260 - 540 €	250 €	200 - 490 €

³⁵ Source: National Agency Erasmus+ Education and Training

ANNEX 2

Results of the survey to European University Alliances representatives

1. On a scale from 1 to 5, with 1 being factor with no impact and 5 being factor with most impact, what impact do you believe Erasmus+ Mobility grant has on a student's decision to carry out a mobility?

	N	%
3	7	17,50%
4	15	37,50%
5	18	45,00%
Total	40	100,00%

2. Using the same scale of 1 to 5, what impact do you believe that an improved Erasmus+ mobility grant that considers factors such as the student's socioeconomic situation and the cost of living of the host city could bring towards a significant increase of students' participation?

	N	%
2	1	2,50%
3	9	22,50%
4	9	22,50%
5	21	52,50%
Total	40	100,00%

3. In a scenery where the Erasmus+ mobility grant is adjusted to consider certain factors, which ones do you believe that would be the most important ones?

(you can choose multiple options)

- The student is considered economically disadvantaged

	N	%
0	13	32,50%
1	27	67,50%
Total	40	100,00%

- The cost of living of the host city

	N	%
0	6	15,00%
1	34	85,00%
Total	40	100,00%

- The cost of living of the host country

	N	%
0	18	45,00%
1	22	55,00%
Total	40	100,00%

• The cost of living of the sending city

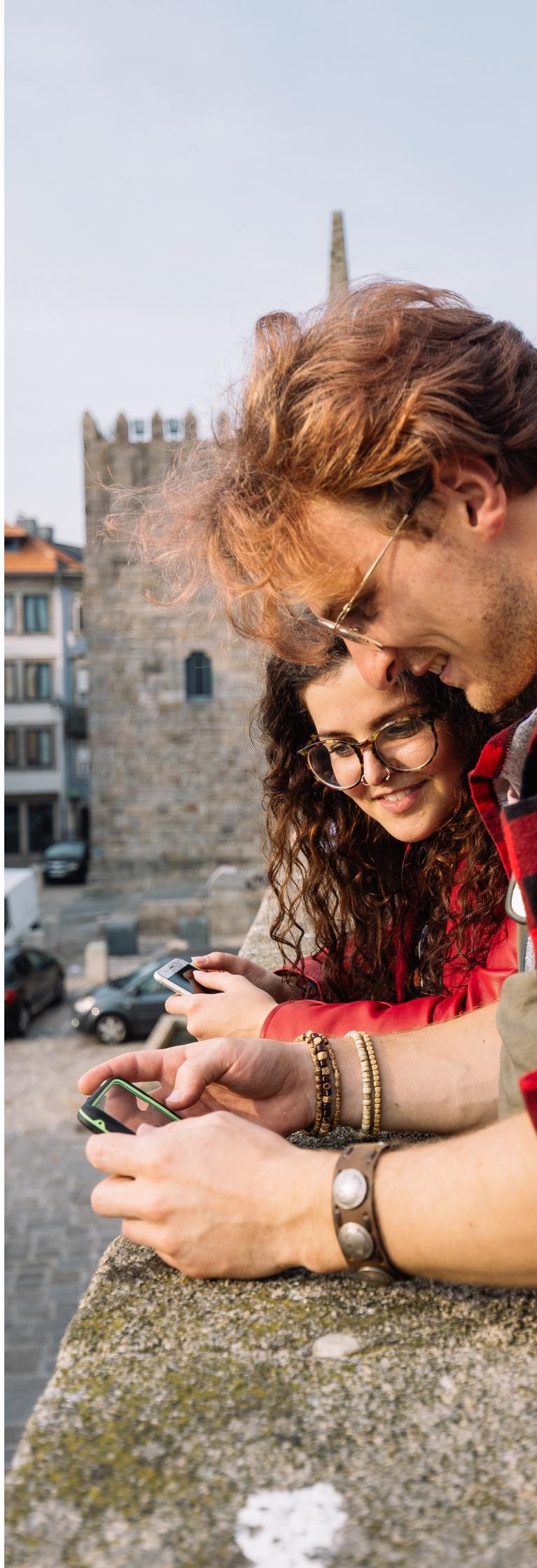
	N	%
0	33	82,50%
1	7	17,50%
Total	40	100,00%

• The cost of living of the sending country

	N	%
0	38	95,00%
1	2	5,00%
Total	40	100,00%

4. What percentage of costs do you think that the Erasmus+ mobility grant should cover?

	N	%
50	4	10,00%
75	12	30,00%
100	24	60,00%
Total	40	100,00%



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IN-DEPTH ANALYSIS ON MOBILITY FUNDING IN ERASMUS AND BEYOND

ERASMUS
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Co-funded by the
Erasmus+ Programme
of the European Union