

***ERASMUS+: KA1 HIGHER EDUCATION  
ERASMUS MUNDUS JOINT MASTER DEGREES***

***PROJECT HANDBOOK***

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## FOREWORD

The purpose of this handbook is to guide Erasmus Mundus Joint Master Degrees (EMJMD) beneficiaries in the administrative and financial implementation of their grant agreement and set the cooperation framework with the Education, Audiovisual and Culture Executive Agency (EACEA – hereinafter the "Agency"). The handbook outlines key rules and procedures to be followed for a smooth and efficient grant management.

The handbook forms Annex IX to the grant agreement. Consequently the rules of the handbook are contractually enforceable.

The handbook intends to serve both as "*vade-mecum*" for beneficiaries and as a management tool. It aims at:

- clarifying various matters arising from the grant agreement and its annexes;
- providing practical information to which beneficiaries may refer to at the different stages of the Master course implementation and the scholarship scheme;
- providing guidance for beneficiaries on handling the financial side of Masters Courses and the scholarship scheme in such a way that financial statements can be readily drawn up.

***The handbook should be used in conjunction with the Erasmus+ Programme Guide, the grant agreement and its annexes, the terms of which take precedence over those set out in the handbook.***

## GLOSSARY

### **Applicant:**

Participating HEI that submits a grant application. An applicant, applying also on behalf of other organisations involved in the consortium is also defined as coordinator.

### **Associated partner:**

Contributes to the implementation of specific tasks/activities and/or supports the dissemination and sustainability of the EMJMD. Such contribution may, e.g. take the form of knowledge and skills transfer, the provision of complementary courses or backing possibilities for secondment or placement. As they may have a more limited role in the implementation of the EMJMD and their expertise might be needed on an ad-hoc basis only, associated partners are not subject to contractual requirements and do not receive funding. However, costs incurred by associated partners may be reimbursed by the EMJMD consortium from the EU "contribution to the consortium's management costs" (lump sum).

### **Beneficiary:**

Once a project proposal is granted, applicants and partners become beneficiaries. The beneficiary organisations are duly represented by the coordinator who is responsible for the coordination and day-to-day management during the EMJMD implementation as stipulated in the general conditions of the grant agreement.

### **Consortium:**

At least three participating HEIs from different Programme Countries teaming up to prepare, implement and follow up an EMJMD course. The consortium can be extended to more organisations from Programme / Partner Countries.

### **Contact person:**

The person responsible for the management of the project vis-à-vis the Agency and the contact for any communication from the Agency to the beneficiaries.

### **Coordinator:**

Through the Mandates the beneficiary organisations (hereinafter referred to collectively as "the beneficiaries" and individually as "beneficiary") have conferred power of attorney to the applicant to sign on their behalf the EMJMD multi-beneficiary grant agreement with the Agency. The applicant thus becomes the coordinator of the EMJMD and the recipient of the Erasmus+ grant instalments.

### **Double degree/multiple degree:**

A study programme offered by at least two (double) or more (multiple) higher education institutions whereby the student receives, upon completion of the study programme, a separate degree certificate from each of the participating institutions.

### **EACEA mobility tool (EMT):**

An IT tool for registering the data of all students and scholars/guest lecturers taking part in an EMJMD student intake, allowing the monitoring of implementation of the action in terms of mobility tracks, financial aspects and academic outputs. In this context and in the framework of the regular reporting obligations to the Agency, the data encoded in the tool will also be used for assessing the consortium's performance as regards the amount and accuracy of the EMJMD scholarship utilisation. Access to the tool and the "EMT User Manual" are available via the following Agency link:

<https://eacea.ec.europa.eu/mobility/index.cfm>

### **ECTS (European Credit Transfer and Accumulation System):**

A learner-centred system for credit accumulation and transfer based on the transparency of learning, teaching and assessment processes. Its objective is to facilitate planning, delivery and evaluation of study programmes and learner mobility through the recognition of qualifications and periods of learning. A system that helps to design, describe and deliver study programmes and award higher education qualifications. The use of ECTS credits, in conjunction with outcomes-based qualifications frameworks, makes study programmes and qualifications more transparent and facilitates the recognition of qualifications.

### **EMJMD Consortium Agreement:**

An agreement obligatory to all EMJMDs and signed by the legally authorised body of each beneficiary (and, if applicable, associated partners) clearly laying down the academic, administrative and financial rules and procedures in adherence with the rules and requirements as set out in the Erasmus+ Programme Guide and the multi-beneficiary grant agreement. Practical guidelines on aspects recommended to be covered can be found on the following Agency website:

[http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space\\_en](http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en)

**EMJMD mobility:**

The EMJMD study period must take place in at least two of the Programme Countries represented in the consortium (i.e. at least two mobility periods for all students). The minimum ECTS credits to be acquired during a single mobility period depend on the length of the Master course.

**EMJMD student scholarships:**

These scholarships include the students' participation costs (including the tuition fees, full insurance coverage and any other mandatory costs related to the students' participation in the course), a contribution to student travel costs and installation costs (relevant only for scholarship holders resident in a Partner Country), as well as a subsistence allowance for the entire duration of the EMJMD study programme. Details on the EMJMD student scholarship amounts are given in the table in section C.2.

**Erasmus Charter for Higher Education (ECHE):**

An accreditation granted by the European Commission giving the possibility to HEIs from Programme Countries to be eligible to apply and participate in learning and cooperation activities under Erasmus+. The ECHE outlines the fundamental principles an institution should adhere to in organising and implementing high quality mobility and cooperation and states the requisites it agrees to comply with in order to ensure high quality services and procedures, as well as the provision of reliable and transparent information.

**Erasmus Mundus Students and Alumni Association (EMA):**

EMA is the association of all EMJMD students offering an international professional and personal network not only during the study period, but also after graduation. It serves as channel of communication for students, alumni, universities and the European Commission. The EMA website is the following:

<http://www.em-a.eu/>

**Erasmus+ Partner Country:**

Country which does not participate fully in the Erasmus+ Programme. For the EMJMD action any non-Erasmus+ Programme Country is considered as 'Partner Country'. Organisations established in a Partner Country may take part as partners or associated partners in an EMJMD project.

**Erasmus+ Programme Country:**

EU and a number of non-EU countries that have established a National Agency and which participate fully in the Erasmus+ Programme. The list of Erasmus+ Programme Countries can be found in Part A of the Erasmus+ Programme Guide: "*Who can participate in the Erasmus+ Programme*" section.

**Erasmus+ Programme Guide:**

The Erasmus+ Programme Guide gives information about the objectives, priorities and main features of the Programme, the Programme Countries, the implementing structures and the overall budget available. It provides guidelines and explanations to understand the objectives, the types of activities that can (or cannot) be supported, as well as the conditions under which the awarded grant can be used, e.g. the implementation provisions of EMJMD activities, the conditions for receiving scholarships, etc. The Erasmus+ Programme Guide 2015 applicable to the Erasmus+ call for proposals EAC/A04/2014, to which the present Project Handbook 2015 refers, can be found on the following Agency website:

[http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space\\_en](http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en)

**Erasmus+ Programme Regulation:**

Regulation (EU) N° 1288/2013 of the European Parliament and of the Council of 11.12.2013 establishing 'Erasmus+': the Union programme for education, training, youth and sport (OJ L347, of 20.12.2013, p. 50).

<http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32013R1288&qid=1395671967554>

**EU Financial Regulation:**

The **Financial Regulation (FR)** is the main point of reference for the principles and procedures governing the establishment and implementation of the European Union budget and the control of the EU finances. The FR is accompanied by the **Rules of Application (RAP)** which contain more detailed and technical rules that are essential for the day to day implementation of the FR. The references to these two Regulations are the following:

Regulation (EU, Euratom) N° 966/2012 of the European Parliament and of the Council of 25.10.2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) N° 1605/2002 (OJ L298 of 26.10.2012, p. 1).

Commission delegated Regulation (EU) N° 1268/2012 of 29.10.2012 on the rules of application of Regulation (EU, Euratom) N° 966/2012 of the European Parliament and of the Council on the financial rules applicable to the general budget of the Union (OJ L362 of 31.12.2012, p. 1).

[http://www.cc.cec/budg/leg/finreg/leg-020\\_finreg2012\\_en.html](http://www.cc.cec/budg/leg/finreg/leg-020_finreg2012_en.html)

**"Heading 1" scholarships:**

Scholarships financed by the Erasmus+ EMJMD main budget line, forming the core part of available funds/scholarships.

**"Heading 4" scholarships:**

Additional scholarships earmarked for nationals from specific countries or group of countries ("*geographical windows*"), e.g. Central Asia, ENI South, Gulf countries, etc. and financed under the following specific EU external action funding instruments:

- Development Cooperation Instruments (DCI): Asia, Central Asia, Middle East, Latin America, South Africa
- European Neighbourhood Instrument (ENI): ENI–East, ENI–South
- Partnership instrument (PI): Gulf countries

**Higher Education Institution:**

Any type of Higher Education Institution (HEI) which, in accordance with national law or practice, offers recognised degrees or other recognised tertiary level qualifications, whatever such establishment may be called, or any institution which, in accordance with national law or practice, offers vocational education or training at tertiary level.

**Joint degree:**

A single degree certificate awarded to a student upon completion of a joint study programme. The joint degree must be signed by the competent authorities of two or more of the participating HEIs jointly and recognised officially in the countries where those participating HEIs are located.

**Joint Diploma Supplement:**

An annex to the Master degree, which is designed to provide more detailed information on the studies completed according to an agreed format. It should be issued to graduates along with their EMJMD diploma [multiple degree (at least double) or joint degree] providing a standardised description of the nature, level, context, content and status of the studies completed by the student, i.e. covering the entire programme and endorsed by all the degree awarding HEIs. It should be produced according to standards agreed by the European Commission, the Council of Europe and UNESCO. More information and examples can be found under the following website:

[http://ec.europa.eu/education/tools/diploma-supplement\\_en.htm](http://ec.europa.eu/education/tools/diploma-supplement_en.htm)

Graduates in all countries taking part in the Bologna Process have the right to receive the Joint Diploma Supplement automatically, free of charge and in a major European language.

**Legal representative (of the coordinator):**

The person authorised to enter into legal and financial commitments on behalf of the beneficiary / on behalf of the EMJMD consortium as a whole.

**Mandate:**

A document signed bilaterally by the applicant and each partner. With the 'Mandate' participating organisations grant power of attorney to the applicant to act in their name and for their account during the implementation of the action.

**Participating organisation:**

Any organisation involved in the implementation of an EMJMD project. Depending on their role in the project, participating organisations can be applicants, partners or associated partners. For contractual management issues, "associated partners" are not considered as part of the EMJMD consortium.

**Student Agreement:**

An agreement signed between the beneficiary and each student enrolled in the EMJMD explicitly indicating any academic, financial and administrative modalities related to the student's participation in the course (including internship periods) and, where applicable, the award and usage of the EMJMD scholarship. The parties signing the agreement commit themselves to comply with all the arrangements agreed (in line with the EMJMD rules stipulated in the Erasmus+ Programme Guide), thereby insuring that both parties are fully aware of the mutual rights and obligations resulting from the implementation/participation in the course. This should include the provisions on evaluation of the EMJMD course as a whole and of the teaching modules in particular. Practical guidelines on aspects recommended to be covered can be found on the following Agency website:

[http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space\\_en](http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en)

**Student intake:**

An EMJMD Master course edition starting in a specific academic year during the implementation period of the EMJMD grant agreement.

***Student candidate withdrawal:***

Following the student selection process and the encoding of the results in the EMT, the consortium should confirm the EMJMD scholarship offer to the students encoded on the "*main list*". At this stage, if a student does not accept/reject the EMJMD scholarship, this is considered a student candidate "***withdrawal***" case.

***Student candidate scholarship cancellation:***

In case an EMJMD scholarship is offered and accepted by a student candidate and for whatever reasons the student renounces/cancels her/his participation in the Masters (informs the consortium that s/he cannot start the study programme), this is considered a student candidate scholarship "***cancellation***" case.

***No-show of a student candidate:***

When an EMJMD scholarship is offered and accepted by a student candidate (who has signed the Student Agreement) and - for whatever reasons the student without having informed the consortium in advance - does not start the study programme, this is considered a "***no-show***" of a student candidate.

***Student drop-out:***

In case an EMJMD scholarship holder decides to discontinue the study programme, or is expelled by the consortium, this is considered a student "***drop-out***" case.

## **A. MULTI-BENEFICIARY GRANT AGREEMENT**

Selected EMJMD courses will be supported through a grant agreement covering one preparatory year and three consecutive student intakes.

The legal representative of the coordinator of the EMJMD consortium signs a multi-beneficiary grant agreement on behalf of the EMJMD consortium. It stipulates the provisions related to the duration and the financing of the action, the reporting and payment arrangements, the settlement of disputes and other special conditions.

The grant agreement is binding to the beneficiaries who are jointly and severally responsible for carrying out the action in accordance with its terms and conditions. The coordinator is responsible for monitoring that the action is implemented in accordance with the provisions of the Erasmus+ Programme Guide, the grant agreement and its Annexes, including this Handbook, and in line with the consortium's internal arrangements defined in the EMJMD Consortium Agreement. In particular, the coordinator, as the recipient of payments on behalf of all the beneficiaries, ensures the accurate repartition of the grant and that appropriate payments are transferred timely to the other beneficiaries.

The starting date of the action and its duration are stipulated in Article I.2.2 of the grant agreement.

The grant agreement covers the entire EU financial contribution to the implementation of the action, i.e. the preparatory year and the three student intakes. The grant is calculated according to the following funding principles:

- a lump sum contribution for the consortium management fees and the academic staff mobility (more details in section C.1);
- a unit contribution to student scholarships of maximum 25 000 EUR per academic year per student (more details in section C.2).

Article I.4 of the grant agreement stipulates the payment arrangements.

The grant agreement also defines the publicity obligations, especially the use of the EU emblem (EU flag) in conjunction with the name "Erasmus+". For further details please see sections C.1 and F of this handbook and also refer to Articles I.9.4 and II.7 of the grant agreement and to the Agency website:

[https://eacea.ec.europa.eu/about-eacea/visual-identity\\_en](https://eacea.ec.europa.eu/about-eacea/visual-identity_en)

## **B. AMENDMENTS TO THE GRANT AGREEMENT**

During the implementation of an EMJMD project, modifications in the action programme may be necessary in order to adapt the Master to a changed project reality. However, beneficiaries should try to limit, as far as possible, the number of requests during the duration of the grant agreement. In any event, modifications should always be requested before they are implemented, and never retroactively.

Proposed modifications must be compatible with the conditions defined in the call for proposals under which the grant agreement is signed, and they may not have as their purpose or effect a major modification of the content of the EMJMD and the related grant agreement. It is strongly recommended to ask for the Agency's advice as soon as any changes are envisaged by the consortium in order to avoid misunderstandings on the admissibility and impact of the changes. The Agency will examine the justification for a modification and decide whether or not to approve the requested change (see B.1 and B.3 below).

Where a request for modification requires the grant agreement to be amended (see B.1 and B.3 below), the coordinator must send to the Agency a written request, dated and signed by its **legal representative**. In order to be admissible, amendment requests must be submitted at least one (1) month before the end of the period of eligibility as detailed in the grant agreement, except in cases duly substantiated and accepted by the Agency. When necessary the Agency may also request a change to the grant agreement. For other types of amendments which are handled via the EACEA Participant Portal please see section B.2.

Unless otherwise specified, the modification(s) will enter into force once the Agency has sent a signed letter/e-mail to the coordinator.

Depending on the nature of the modification, amendments may be done through different procedures.

### **B.1 AMENDMENTS VIA AN EXCHANGE OF LETTERS**

Before any amendment can take effect, it needs to be agreed in writing.

A request for amendment on behalf of the beneficiaries must be submitted by the coordinator and will be handled in close cooperation with the Agency. A request for an amendment sent by email is accepted on the condition that it is a scanned copy of the original duly signed by the legal representative and attached to the email.

Requests for changes leading to a modification of the grant agreement must be supported by a detailed justification and full details of the desired changes. The Agency acknowledges receipt of an amendment request and, if necessary, requests further information (e.g. missing accompanying documents/justifications). Failure to provide such supporting documentation will considerably delay the review process and may lead to the refusal of the request. It should also be noted that if no modification request has been submitted, a change in the project implementation will cause serious difficulties at final report stage and in certain circumstances may thus result in a reduction of the final grant.

Once an amendment request has been approved, the Agency shall inform the coordinator through a letter of amendment. Pending such exchange of letters, the requested changes are not considered approved by the Agency.

#### **B.1.1 Change in the consortium composition**

A change in the consortium composition may involve one of the beneficiaries, or the coordinator. The latter case is dealt with separately (see B.1.2 below) since it also implies a change in the legal accountability under the grant agreement.

As a general rule, a change in the consortium composition may result:

- 1) from the joining of one or more additional partners, thus becoming beneficiaries of the grant – which may under no circumstances lead to an increase of the grant awarded;
- 2) the withdrawal of one or more partners;
- 3) the replacement of one partner by another (new entry in the consortium).

Any involvement of an organisation whose data do not appear in the original application or whose participation in the EMJMD course has not been approved in advance in writing by the Agency – following an amendment request sent by the coordinator – will not be recognised in the framework of the grant agreement, and as a result, any related costs will be considered ineligible.

These scenarios may have an impact on the content and the quality of the EMJMD, since the withdrawal of one of the beneficiaries or the joining of another may change the structure of the course and will affect the teaching modules and mobility arrangements. It can also have consequences in financial terms, in particular as regards the distribution of the grant among the beneficiaries. Therefore, such change must be endorsed by the other beneficiaries and notified to the Agency. When a new partner joins the consortium a bilaterally signed Mandate (by the coordinator and the new partner) must be provided. The Agency will acknowledge receipt of a valid request for amendment by the coordinator or, if necessary, request further information (e.g. in case of a lacking proof of endorsement by the beneficiaries).

If a change in the consortium is envisaged, a new and full description of the role of each beneficiary institution must be submitted to the Agency. This description will be assessed against the eligibility, exclusion, selection and award criteria, operational and financial capacity (when applicable), used at application stage, if necessary with the help of external academic experts. Should the new consortium be judged ineligible or insufficient in quality, the grant agreement may be terminated.

Should a beneficiary leave the EMJMD during the period of eligibility, the use of the lump sum contribution and the payment of scholarships by that beneficiary remains an eligible expenditure of the consortium, provided this expenditure has occurred before the beneficiary's withdrawal and that the beneficiary is able to supply the relevant supporting documents regarding the payment of scholarships.

NOTE: Joining/withdrawal of associated partners are not considered amendments. The notification and approval procedures are explained further below in this handbook (see section B.4).

### **B.1.2 Change of the coordinator**

A change of the coordinator requires an amendment. This implies a change in the legal liability under the grant agreement (assignment of grant agreement) and is always subject to an amendment procedure. It should be noted that the new coordinator (assignee) will be liable for all rights and obligations under the remaining entire duration of the grant agreement.

A change of coordinator may occur for several reasons:

- the former coordinator no longer exists (e.g. change in legal status, also due to a merger, etc.);
- the former coordinator still exists, but proposes to withdraw (e.g. no longer willing or able to implement the project);
- assignment (the coordinator is replaced by a legal entity which is not a member of the consortium).

A change of coordinator must always be endorsed by both organisations concerned (endorsement signed by their legal representatives): the former coordinator (assignor) which renounces to all its rights and obligations in the context of the grant agreement, and the new coordinator (assignee) which agrees to take over the full responsibility (including financial accountability) of a running grant agreement from the start until the end, i.e. also for activities undertaken before it became the coordinator. In this context, the former coordinator must transfer the balance of any pre-financing of the grant not yet used to the new coordinator. In addition, the written endorsement of all beneficiaries is required in order to approve the proposed new coordinator.

In case of assignment a special three-party contract will have to be signed when the new coordinator is not already a member of the consortium.

In any event, as the change of the coordinator may have an impact on the content or the quality of the EMJMD, a new and full description of the EMJMD and the role of each beneficiary institution must be submitted. This description will be assessed against the eligibility, exclusion, selection and award criteria used at application stage, if necessary with the help of external academic experts. Should the new consortium be judged ineligible or insufficient in quality, the grant agreement may be terminated.

### **B.1.3 Change of the timeframe of an intake / extension of the period of eligibility**

Requests to extend the duration of an intake will only be accepted if, after careful scrutiny, the Agency considers the extension justified.

An extension of the duration of an intake will not be granted in the following type of cases (non-exhaustive list):

- missed or delayed course enrolment and/or missed/delayed start of mobility because of administrative formalities (e.g. delayed/denied approval of visa or residence permit);
- missed or delayed start of study modules, internship, placement, field work study, or Master thesis activities for reasons accountable to the consortium;
- poor academic performance and/or failure of exams.

Unless justified medical reasons apply (applicable to the student or a direct family member), an extension of the duration of an intake cannot be taken into consideration.

Change of the timeframe of the first and second intakes will be dealt with in accordance with the procedure defined under B.4 – "Modifications requiring a Notification to the Agency".

A change request relating to the third intake of the EMJMD entails the change of the end of the period of eligibility and consequently will require an amendment to the grant agreement (Article I.2). Any request for extending the period of eligibility will lead to postponing the final report submission deadline accordingly. The extension of the eligibility period cannot exceed 12 months and cannot give rise to additional funding for the consortium or a scholarship holder.

#### **B.1.4 Changes in the content and/or structure of the EMJMD course**

It may happen that changes in the content and/or structure of the EMJMD are envisaged by the consortium, e.g. the creation of new mobility tracks, a substantial change in the management structure of the consortium, or a change in the facilities/services offered to students. As these types of modification may have an impact on the overall quality of the original proposal, they must be subject of a request for an amendment that will include a thorough description of the changes, the proposed solutions, and their expected impact on the original proposal.

Depending on the scope and the impact of the modifications, the Agency reserves the right to have them assessed by external academic experts. If the proposed changes undermine the quality of the EMJMD or the basis on which the selection decision has been taken, the Agency may decide to reject them.

It should be noted that the selected EMJMD consortia commit themselves to maintain the EMJMD in the form approved in the grant agreement. The Agency will therefore not approve substantial changes to the content of the Master course (e.g. a change of discipline or thematic focus of the course) as such changes would undermine the basis on which the EMJMD selection decision has been taken.

#### **B.1.5 Change of the legal representative of the coordinator**

The letter (signed by the new legal representative) notifying the change to the Agency must be accompanied by an official original document confirming the capacity of the new legal representative to enter into legal / financial binding commitments on behalf of the beneficiaries. The Agency will either confirm the change by way of sending a letter of amendment or, if necessary, request further information. Pending such exchange of letters, changes are not considered approved by the Agency.

#### **B.1.6 Change of bank account information**

Change of the bank account information must be reported to and approved by the Agency. Such request must include a completed and duly signed Financial Identification form available on the following website: [http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/financial\\_id/financial\\_id\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm). Once approved, the Agency shall inform the coordinator accordingly via a letter of amendment. Pending such exchange of letters, bank account modifications are not considered approved by the Agency.

### **B.2 AMENDMENTS VIA THE EACEA PARTICIPANT PORTAL**

The EACEA Participant Portal allows the beneficiaries to register themselves any changes related to their legal entities. The signature of the legal representative of the coordinator is replaced by the Legal Entity Appointed Representative (LEAR), logging in into the Participant Portal and submitting the information related to the change.

Changes of organisation data of a beneficiary will have to be communicated by the Legal Entity Appointed Representative (LEAR), or the person with Account Administrative role, and provide the supporting documents<sup>1</sup> via the **My Organisations** option in the organisations menu by using the Unique Registration Facility (URF) hosted in the EACEA Participant Portal under the following link: <https://ec.europa.eu/education/participants/portal/desktop/en/organisations/register.html>

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<sup>1</sup> An updated and duly completed and signed Legal Entity form available under the following website: [http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/legal\\_entities/legal\\_entities\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm) together with the related supporting documents.

Changes made by the beneficiaries in the Participant Portal are considered to be sufficient and deemed to be equal to an amendment request.

Updates of the beneficiaries' legal records may concern changes in the following data:

- ▶ Legal name
- ▶ Legal address
- ▶ VAT n°
- ▶ Registration n°
- ▶ Legal status (*SPRL, SA, etc.*)
- ▶ Legal type (*legal-natural person, NGO, Public, Private, Non Profit*)
- ▶ Language
- ▶ Website

The authentication status of the organisation will change in the IT tool and the validation team in charge will treat the change request, verify the new data and authorise the changes as appropriate. Once the changes are validated, the Agency's databases will be updated automatically and an automatic request for amendment of beneficiary data will be created in its IT systems.

Provided that the changes are compatible with the eligibility, exclusion and selection criteria applied during the selection process (including where applicable proof of operational and financial capacity), the Agency will approve the changes and the beneficiary concerned will be informed accordingly by means of a notification sent to the coordinator. Pending such notification, the above-mentioned changes of the legal status are not considered approved by the Agency.

Typically such modification requests occur following a privatisation of a public body or vice-versa, a take-over by another organisation, or following a merger of two existing legal entities. Such changes often entail changes of the bank information as well, which then will require an amendment via an "*Exchange of letters*" sent to the coordinator (see B.1.6).

### **B.2.1 Change in the legal status/type of a beneficiary**

The new legal status/type of a beneficiary has to be examined to ensure that it still fulfils all the eligibility and selection criteria originally applied. If this change results in non-fulfilment of the eligibility and/or selection criteria, this should be regarded as equivalent to termination of its participation. It will also be verified whether the eligibility criteria at project level are still respected. If this is not the case, this should be regarded as equivalent to termination of the grant agreement.

### **B.2.2 Change of legal name of a beneficiary**

In certain cases, what appears to be a change of the legal name may in fact refer to a different change (e.g. new legal entity, transfer of rights and obligations), which may require other supporting documents to be provided and a different treatment. In case of doubt, the beneficiary must contact the Agency and provide the details needed in order to be able to decide the course to be taken.

### **B.2.3 Change of legal address**

The change will be accepted provided that it is still compatible with the eligibility criteria. The Agency notification will take the form of an email in case of change of the legal address of a beneficiary and by an official letter in case of change of the legal address of the coordinator.

### **B.2.4 Change of language/website**

The Agency will acknowledge the change occurred.

## **B.3 AMENDMENTS BY EMAIL**

Considering the limited risk related to the following changes, the reply of the Agency can be an email.

### **B.3.1 Change of the address of a beneficiary (*not of the coordinator*)**

Such a modification is made by the LEAR of the beneficiary in the Participant Portal. Before the Agency accepts it, it will have to be ensured that it is in line with the eligibility criteria of the call for proposals. Should the change of address of a beneficiary be accepted by the Agency, the recipients of the emails should be the coordinator and the beneficiary concerned by the change.

### **B.3.2 Change of the legal representative of a beneficiary (*not of the coordinator*)**

A request for amendment will have to be sent which can be an email or a letter attached to an email. If it is a letter attached to an email, it should be signed by the legal representative. If it is an email, the legal representative should be at least in carbon copy (Cc) of the email.

### **B.3.3 Change of the contact person (i.e. responsible for the management of the EMJMD)**

A request for amendment has to be sent, which can be an email or a letter attached to an email. If it is a letter attached to an email, it should be signed by the legal representative of the coordinator. If it is an email, the legal representative should be at least in carbon copy (Cc) of the email. The email/letter should specify all relevant contact details of the new contact person, i.e. title/full name, department/faculty if relevant, role in the organisation, email, business address, telephone.

### **B.3.4 Extension of deadline for submission of reports exceeding 30 days**

A change in the deadline for the submission of reports exceeding 30 days (without the extension of the eligibility period) must be submitted as soon as possible, and before the initial contractual deadline has been reached. The extension request needs to be duly justified.

If it affects the eligibility period, then it will have to be checked whether a prolongation of the duration of the eligibility period should be envisaged and whether such a change is in line with the provisions of the call for proposals (see B.1.3 above).

## **B.4 MODIFICATIONS REQUIRING A NOTIFICATION TO THE AGENCY**

In complement to the EMJMD changes leading to an amendment of the grant agreement that are presented above (B.1, B.2 and B.3), other changes may occur (see below) which will not affect the agreement but will nevertheless require a notification to the Agency (by letter or e-mail sent by the legal representative or the contact person, or via the EMT) in order to be recorded in the Agency's relevant management tools and to be taken into account for the efficient monitoring of the EMJMD.

### **B.4.1 Change in the scholarship allocation – via the EMT**

The EMJMD contact person, in agreement with the other beneficiaries, may adjust the estimated number of scholarships per intake by transfers between the two categories of Heading 1 scholarships (i.e. Programme / Partner Country), or by increasing the allocated number of scholarships, provided that these adjustments do not negatively affect the proper implementation of the EMJMD and that the transfer between the two categories or the increase do not result in exceeding the maximum amount of the grant allocated to the EMJMD student scholarships as indicated in Article I.3(b) of the grant agreement (see C.2).

Furthermore, the scholarship transfer must not infringe the basic condition of **at least 75% of Heading 1 scholarships (in terms of numbers, not budget) being allocated to students from Partner Countries.**

A necessity for a Heading 1 scholarship transfer may occur in case the consortium:

- is left with unused EMJMD budget/scholarships (full or partial) following no-show of student candidates or student drop-outs;
- needs to respond to a possible over-demand in scholarships for Programme or Partner Country student candidates.

As a general rule, the Agency will not accept reallocation of scholarships if (see also E.3):

- there is an eligible candidate under the category from which the transfer is requested;
- the transfer request concerns the two different budgetary headings of EMJMD (e.g. between Heading 1 – the core budget line financing the Programme / Partner Country scholarships of students in the main list, and Heading 4 – the EU external action funding instruments financing the "geographical window" scholarships).

Requests for scholarship transfers (see also section E.3) must be entered in the EMT as soon as they occur and be included in the regular reporting obligations of the consortium (see section G). The Agency will confirm the change in the scholarship allocation by way of approving the transfer in the EMT or, if necessary, request further information. Pending such validation a transfer of scholarships is not considered approved by the Agency. However, the responsibility for respecting the rules regarding scholarship allocation remains with the consortium. The selection, recruitment and monitoring of individual scholarship holders fall under the responsibility of the consortium.

The budget allocated to the lump sum contribution to cover the EMJMD consortium management costs and costs for invited scholars/guest lecturers as indicated in Article I.3(c) of the grant agreement cannot be modified (see section C.1).

#### **B.4.2 Change of an associated partner within the consortium**

A change of an associated partner within the beneficiary consortium does not modify the grant agreement. However, since the associated partner may play an important role in the promotion, implementation, evaluation and sustainable development of the EMJMD, such changes must be endorsed by the beneficiaries and notified to the Agency.

The Agency will acknowledge receipt of a valid notification by the coordinator or, if necessary, request further information (e.g. in case of a lacking proof of endorsement by the beneficiaries). Once the change has been processed in the Agency's database the coordinator will be notified accordingly.

#### **B.4.3 Change of deadline for submission of reports (up to 30 days)**

A prolongation of the submission deadline of a report up to one month may be requested via a simple notification sent by the EMJMD contact person. The prolongation request must be duly justified. The Agency will acknowledge receipt of the request and will notify the EMJMD contact person in writing.

#### **B.4.4 Change of contact data of the legal representative / contact person**

While the change of the legal representative of the coordinator, or of the EMJMD contact person, affects the grant agreement and has to be handled via the procedures described under B.1.5 and B.3.3 above, changes in their contact data just have to be notified in writing to the Agency in order to update the relevant management tools.

#### **B.4.5 Change of the timeframe of the first and second intakes**

An extension of the timeframe of the first or second intake may be requested, subject to the conditions specified under B.1.3 above. This will allow the payment of scholarships (up to the maximum number of monthly instalments of the scholarship scheme) to the student(s) who for duly justified reasons had to extend their study period. The extension cannot exceed 12 months.

### **B.5 OTHER CHANGES**

All other changes that are not covered by the examples indicated above should be communicated to the Agency in the context of the regular reporting obligations of the consortium (see section G). This may concern changes like e.g. the implementation of a new EMJMD summer school.

EMJMD consortia should nevertheless be very careful to ensure that such changes are not in conflict with the basic requirements of the Erasmus+ Programme (including compliance with the eligibility, exclusion, selection and award criteria) and/or that they do not negatively affect the overall quality of the original proposal. As a result, in case of doubt, the EMJMD contact person is invited to liaise with the Agency in order to verify in advance the admissibility of the change envisaged and, if applicable, the relevant procedure to follow.

#### **FORCE MAJEURE**

A situation of *force majeure* (Article II.14 of the grant agreement) may lead to two different situations:

- temporary suspension of the action; or
- changes in the action (without suspension)

that will both require an amendment.

- ▶ If the action had to be suspended because of *force majeure*, an amendment referring to the suspension (Article II.15.1 of the grant agreement) is necessary.
- ▶ If the coordinator does not wish to suspend the implementation but is proposing some changes (content of the course, budget etc.) in order to overcome the *force majeure*, the amendment will not refer to a suspension, but to the changes of content of the course, budget etc.

If because of *force majeure* the action or a part of it was suspended, once it can be resumed, the coordinator will have to submit a request for an amendment. In most cases, apart from any changes in the content and/or budget which may be required, the eligibility period of the project will be extended (please see B.1.3). Usually the duration of this prolongation is equal to the one of the suspension, unless there is a justified reason to establish a different period of prolongation or even no prolongation at all. This will depend on the part of the action which could still be implemented, and in any case it will have to be assessed on a case-by-case basis. Furthermore, such an amendment should respect any restrictions imposed by the call for proposals, e.g. the maximum duration of the eligibility period and/or a fixed end date of the supported actions.

However, once the reasons for the suspension are lifted, it could be that completing the tasks as originally planned is no longer possible (e.g. the site where the project should take place has been completely devastated making the implementation of the planned activities impossible). It may also turn out that only part of the initially agreed project could be implemented. The possibility to adapt the grant (its content, budget, etc.) to the new implementing conditions would need to be explored in every specific case, with due regard to the main principles for amendments. If the intended amendment puts into question the award decision or the equality of treatment, the grant agreement would need to be terminated.

## B.6 SUMMARY TABLE OF AMENDMENTS/MODIFICATIONS TO THE GRANT AGREEMENT

	<b>B.1</b>  EXCHANGE OF LETTERS  (Amendment)	<b>B.2</b>  AMENDMENTS VIA THE EACEA Participant Portal  (Amendment)	<b>B.3</b>  AMENDMENTS BY EMAIL  (Amendment)	<b>B.4</b>  NOTIFICATION  (Modification)
<b>CHANGES</b>	<ol style="list-style-type: none"> <li>1) Change in the consortium composition</li> <li>2) Change of the coordinator</li> <li>3) Change of the timeframe of an intake / extension of the period of eligibility</li> <li>4) Changes in the content and/or structure of the EMJMD course</li> <li>5) Change of the legal representative of the coordinator</li> <li>6) Change of bank account information</li> </ol>	<ol style="list-style-type: none"> <li>1) Change in the legal status/type of a beneficiary</li> <li>2) Change of legal name of a beneficiary</li> <li>3) Change of legal address</li> <li>4) Change of language/website</li> </ol>	<ol style="list-style-type: none"> <li>1) Change of the address of a beneficiary (<i>not of the coordinator</i>)</li> <li>2) Change of the legal representative of a beneficiary (<i>not of the coordinator</i>)</li> <li>3) Change of deadline for submission of reports &gt; 30 days (<i>without extension of eligibility period</i>)</li> <li>4) Change of the contact person (<i>i.e. person dealing with EMJMD on a daily basis</i>)</li> </ol>	<ol style="list-style-type: none"> <li>1) Change in the scholarship allocation – via the EMT</li> <li>2) Change of an associated partner within the consortium</li> <li>3) Change of deadline for submission of reports (&lt; 30 days)</li> <li>4) Changes of contact data of the legal representative / contact person</li> <li>5) Change of the timeframe of the first and second intakes</li> </ol>
<b>PROCEDURE</b>	<p>Request for an amendment by letter, with supporting documents attached, dated and signed/sent by the legal representative of the coordinator.</p> <p>Submission of the request:</p> <p>For 1), 2), 3) and 4) above:</p> <ul style="list-style-type: none"> <li>• <b>before it is due to take effect</b></li> </ul> <p>For 5) and 6) above:</p> <ul style="list-style-type: none"> <li>• <b>as soon as the change occurs</b></li> </ul> <p>For 1) to 6) above:</p> <ul style="list-style-type: none"> <li>• <b>at least 30 calendar days before the end of the period of eligibility of the grant agreement</b></li> </ul>	<p>Request for an amendment via the EACEA Participant Portal, introduced by LEAR.</p> <p>Submission of the request:</p> <ul style="list-style-type: none"> <li>• <b>as soon as the change occurs</b></li> </ul>	<p>Request for an amendment by an email (or a letter dated and signed/sent by the legal representative of the coordinator attached to an email), where relevant together with supporting documents.</p> <p>Submission of the request:</p> <p>For 1) and 3) above:</p> <ul style="list-style-type: none"> <li>• <b>before it is due to take effect</b></li> </ul> <p>For 2) and 4) above:</p> <ul style="list-style-type: none"> <li>• <b>as soon as the change occurs</b></li> </ul>	<p>Submission of the request for modification:</p> <ul style="list-style-type: none"> <li>• <b>as soon as the change occurs</b></li> </ul>

	<b>B.1</b> <b>EXCHANGE OF LETTERS</b>	<b>B.2</b> <b>AMENDMENTS VIA THE EACEA Participant Portal</b>	<b>B.3</b> <b>AMENDMENTS BY EMAIL</b>	<b>B.4</b> <b>NOTIFICATION</b>
<b>EACEA</b>	<p>Acknowledgement of receipt will be sent.</p> <p>The Agency approves or rejects the request for amendment in writing within <b>30 calendar days (indicative) after</b> receipt of the request.</p> <ul style="list-style-type: none"> <li>Following approval/validation, the Agency sends an amendment letter. Pending such exchange of letters, changes are not considered as approved by the Agency.</li> </ul>	<p>Acknowledgement of receipt will be sent.</p> <ul style="list-style-type: none"> <li>An automatic notification of the modification occurred will be sent.</li> </ul>	<p>Acknowledgement of receipt will be sent.</p> <p>The Agency approves or rejects the request for amendment in writing within <b>30 calendar days (indicative) after</b> receipt of the request.</p> <p>For 1) above:</p> <ul style="list-style-type: none"> <li>Following approval/validation, the Agency sends an email. Pending such exchange of emails, change is not considered as approved by the Agency</li> </ul>	<p>For 1) above:</p> <p>Following analysis of the change request, the Agency validates the scholarship transfer in the EMT.</p> <p>For 2), 3) and 4) above:</p> <p>The Agency sends a notification in writing within <b>30 calendar days (indicative)</b> acknowledging the change occurred.</p>

## C. COMPOSITION OF THE EU GRANT

The Agency determines the EMJMD grant in accordance with the rules set out in the Erasmus+ Programme Guide, the EMJMD call for proposals, and the requested/available budget for selected projects. A grant agreement (see section A) is concluded between the beneficiaries and the Agency covering the preparatory year and three consecutive student intakes of the EMJMD. This agreement specifies in Annex III: "*Estimated budget of the Action*"<sup>2</sup> the EU funding for the scholarships and the management lump sum contribution.

The EMJMD grant is divided in two (2) different components:

- **Erasmus Mundus Joint Master Degree management**
- **Erasmus Mundus Joint Master Degree student scholarships**

### C.1 EMJMD MANAGEMENT (LUMP SUM CONTRIBUTION)

Contribution to the consortium management costs <sup>3</sup> and costs for invited scholars and guest lecturers	20 000 EUR for the preparatory year
	50 000 EUR per intake of the EMJMD

The Agency pays a lump sum contribution in the amount of maximum 170 000 EUR (preparatory year + three student intakes) to the EMJMD grant beneficiary (coordinator) in accordance with the payment arrangements laid down in the grant agreement. Although the Agency does not request financial justifications for the payment of the lump sum contribution<sup>4</sup>, it needs nevertheless, through the regular reporting obligations and for statistical reasons, to be informed how the lump sum contribution was used, i.e. distribution among the beneficiaries, course promotion, website of the course, etc.

The lump sum contribution shall also cover the mandatory involvement of high-level scholars/guest lecturers to increase the course attractiveness as well as the participation of the beneficiaries in events organised by the Agency (e.g. EMJMD coordinators' meeting, EMJMD cluster meetings, etc.).

The EMJMD consortium is expected to put in place a selection procedure for scholars/guest lecturers and engage those holding an outstanding academic and/or professional profile. They may come from both Programme and Partner Countries and their involvement should bring added value to an EMJMD student intake in terms of student-centred teaching/lecturing, research activities, Master thesis support, academic/professional networking, etc. The performed tasks and results from scholar engagements within the EMJMD must be described in the context of the mandatory project reporting.

#### ► **Scholar/guest lecturers' remuneration**

Each EMJMD course is expected to engage minimum 4 different scholars/guest lecturers per student intake for a minimum of 8 weeks in total per intake. A "week" is defined as minimum 4 out of 7 consecutive calendar days.

NOTE: It is not possible to consider 8 consecutive days as 2 weeks.

Scholar/guest lecturers' mobility is considered eligible in the following cases:

- mobility between the partners of the consortium (including to/from associated partners);
- mobility from outside the consortium, in case such mobility is clearly linked to the Master course.

A scholar/guest lecturer paid by other EU funding schemes (including other Erasmus+ actions) cannot be considered eligible, nor can their engagement be reported as EMJMD scholar week.

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<sup>2</sup> Commission Decision C(2013)8550 of 04.12.2013 on "The use of lump sums, the reimbursement on the basis of unit costs and the flat-rate financing under the 'Erasmus+' Programme"  
[http://ec.europa.eu/dgs/education\\_culture/more\\_info/awp/docs/c\\_2013\\_8550.pdf](http://ec.europa.eu/dgs/education_culture/more_info/awp/docs/c_2013_8550.pdf)

<sup>3</sup> Costs incurred by associated partners may be reimbursed by the EMJMD consortium only from the EU "*contribution to the consortium's management costs*" (lump sum).

<sup>4</sup> For technical and financial checks, audits, interim and final evaluation purposes, the beneficiaries shall keep all relevant original documents, especially accounting and tax records for a period of five years starting from the date of payment of the balance.

There is no maximum number of EMJMD scholars to be engaged per student intake. The minimum duration per engagement of an EMJMD scholar is 4 to 7 consecutive calendar days (= one week). Days of scholar work may include travelling time.

The remuneration of scholars/guest lecturers from the management lump sum contribution can be fixed by the consortium. The amount to be paid to scholars should cover both travel/installation contribution and working fees. Details of the scholars' engagement in the EMJMD in terms of mobility duration, nationality, origin and hosting HEI, activities carried out, etc. must be duly encoded in the EMT. The Agency will reduce the amount of the lump sum by 1 950 EUR for each scholar week not duly carried out and/or not reported (see also "**Poor, partial or late implementation**" in section G.5).

## C.2 EMJMD STUDENT SCHOLARSHIPS

The EMJMD student scholarships include:

- a contribution to the students' participation costs (including the tuition fees, library and laboratory costs, full insurance coverage and any other mandatory costs related to the students' participation in the Master);
- a contribution to student travel and installation costs;
- a monthly subsistence allowance for the entire duration of the EMJMD study programme.

As the contribution to student travel and installation costs (see C.2.2 below) and the monthly subsistence allowance (see C.2.3 below) depend on the place of residence of a scholarship holder, EMJMD consortia are invited to consult the [PRADO website](#) (Public Register of Authentic Travel and Identity Documents Online) published by the General Secretariat of the Council of the European Union (GSC), with information on a list of documents that could serve as proof for determining the legal residency of a person. EMJMD consortia are invited to take note of the relevant documents for a student candidate - as appropriate - in order to be able to enter the right place of residence in the EACEA Mobility Tool (EMT).

Details on the EMJMD student scholarship amounts are given in the table below:

### C.2.1 Contribution to the participation costs

Contribution to the participation costs	<p>up to 9 000 EUR per year per scholarship holder from a Partner Country</p> <p>up to 4 500 EUR per year per scholarship holder from a Programme Country</p>
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NOTE:

- Students whose citizenship is one of the Erasmus+ Partner Countries count as Partner Country students.
- Partner Country students who are not residents nor have carried out their main activity (studies, training or work) for more than a total of 12 months over the last five years in any Programme Country are considered as Partner Country students<sup>5</sup>. The five-year reference period for this 12-months rule is calculated backwards as from the submission deadline (defined by the consortia) of applying for an EMJMD student scholarship.
- Students whose citizenship is one of the Erasmus+ Programme Countries count as Programme Country students. Students with a Partner Country citizenship who do not fulfil the Partner Country criteria defined above (12-months rule) count as Programme Country students.
- Students with a double nationality (of a Partner and of a Programme Country) must specify the nationality under which they submit their scholarship application.

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<sup>5</sup> The 12-months residency rule should not apply to the Partner Country candidates who for various reasons and under various circumstances have sought refuge and received a refugee status in a Programme Country.

- The amount of the EU grant contribution to the participation costs (see Annex III of the grant agreement) is calculated based on the participation costs per Programme and Partner Country student submitted by the consortium at application stage. The participation cost per student is established as an average applying to each of the three EMJMD intakes and is expected to remain unchanged.
- The participation costs charged for student enrolment in any of the three intakes must be clearly announced on the EMJMD's website. For a given intake, should the amount per student on the website be lower than the average participation costs per student (Programme and/or Partner Country) as stipulated in Annex III of the grant agreement and/or encoded in the EMT, the Agency will consider the one announced on the EMJMD website for determining the final amount of the grant. This may therefore result in a lower EU grant contribution.
- For each student and each intake, actual participation costs in excess of the EU grant contribution for Programme/Partner Country students (see Annex III: "unit cost per student") must be covered by the consortium and cannot be charged to the scholarship holder, i.e. consortia grant the EMJMD scholarship holders a fee waiver.
- Actual participation costs charged to all enrolled students (Programme and/or Partner Country) throughout the three EMJMD intakes in excess of the EU total contribution to the participation costs (as indicated in Annex III of the grant agreement) must be covered by the consortium.

### C.2.2 Contribution to the travel and installation costs

Contribution to the travel and installation costs	1 000 EUR per year per scholarship holder resident in a Programme Country for travel costs
	2 000 EUR per year for travel costs + 1 000 EUR for installation costs for scholarship holder resident in a Partner Country whose location is situated at less than 4.000 km from the EMJMD coordinating HEI
	3 000 EUR per year for travel costs + 1 000 EUR for installation costs for scholarship holder resident in a Partner Country whose location is situated at 4.000 km or more from the EMJMD coordinating HEI

#### NOTE:

It is the responsibility of the consortium to verify the place of residence of the student candidate. The place of residence should be verified on the basis of the provision of the documents listed in the [PRADO website](#):

- e.g. a residence certificate issued in accordance with the candidate's municipality normal registration rules;
- a certificate from the candidate's place of work, study or training issued by the employer or institution in question.

Both documents must have been issued within 12 months before the submission deadline of applying for an EMJMD student scholarship, i.e. the consortium's official deadline for student selection.

The contribution to the travel costs takes into account the country of residence of the scholarship holder. A unit cost per academic year and a distance band of 4.000 km applies to **any** student resident in a Partner Country (including students with a Programme Country citizenship). Students resident in a Programme Country (including students with a Partner Country citizenship) are covered by a fixed unit cost of 1 000 EUR per academic year. Consortia are invited to use the "Distance calculator" available on the following Erasmus+ website: [http://ec.europa.eu/programmes/erasmus-plus/tools/distance\\_en.htm](http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm) in order to calculate the travel distances from the scholarship holder city of residence to the city of the coordinating institution, and to decide the distance band (unit cost) applicable to scholarship holders.

A contribution to installation costs is offered only to students resident in a Partner Country (1 000 EUR per intake). It is an incentive to help covering the additional costs related to the issuing of visas, residence permits, etc. as well as the temporary accommodation needs upon arrival in the first Programme Country hosting HEI and the subsequent mobility trajectories.

The specificities applicable to each scholarship holder must be duly encoded in the EMT.

### C.2.3 Contribution to subsistence costs

Contribution to subsistence costs	1 000 EUR per month for the entire duration of the EMJMD study programme (24 months maximum).
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NOTE:

Contribution to subsistence costs must:

- neither be given to scholarship holders for the EMJMD periods (study /research /placement /thesis preparation) spent in their country of residence;
- nor to scholarship holders from a Partner Country for the EMJMD periods exceeding three months (indicatively the equivalent of 15 ECTS credits) spent in any Partner Country.

## D. PREPARATORY YEAR ACTIVITIES

Following the signature of the grant agreement and its entry into force, the EMJMD consortium will have a period of 12 months in which any preparatory activities in view of the first student intake shall be carried out, e.g. internal cooperation mechanisms, promotion campaign, student admission requirements, financial plan, academic management and related matters, definition of mobility rules, insurance coverage, degree awards, implementation of student/graduate surveys, link to labour market and involvement of employers, etc.

### D.1 CONSORTIUM AGREEMENT

The Erasmus+ Programme Guide stipulates that the institutional commitment of all the organisations participating in an EMJMD consortium must be ensured prior to the enrolment of the first EMJMD students. The Consortium Agreement will be a key instrument for this purpose, thus it should guarantee solid institutional embedding, and effective management/cooperation mechanisms within the partnership. Furthermore, it should not only be understood as a tool that solely contributes to the development and management of the EMJMD, but also as an incentive for reaching the institutional goals aimed at by running an EMJMD programme.

The Consortium Agreement will have to be signed by all participating organisations (coordinator, partners, associated partners) prior to the consortium's launching of the first call for applications. An original copy must be sent to the Agency together with the "*Technical report*" to be submitted **by 31.10.2016**.

Indicatively, the Consortium Agreement must cover elements like (*non-exhaustive list*):

- ▶ **Management:** nomination of programme coordinators in each beneficiary organisation; appointment of the management board, definition of cooperation principles (roles and duties / rights and obligations of each participating organisation) in accordance with the general conditions stipulated in the grant agreement, etc.
- ▶ **Academic programme, course structure, mandatory mobility components**
- ▶ **Joint student application, selection and admission requirements:** define the eligibility criteria and selection criteria; agree on the number of students (self-funded and EMJMD scholarship holders) to be admitted to the programme, etc.
- ▶ **Joint assessment methods of students' performance:** joint grading scales and passing thresholds; resits, etc.
- ▶ **Joint recognition mechanisms and final degrees awarded:** multiple degree (at least double) / joint degree
- ▶ **Tuition fees and insurance scheme for the students:** proper disbursement of fees to each partner institution; suitable insurance policy for students in accordance with the minimum requirements imposed by the Erasmus+ Programme, etc.
- ▶ **Selection and engagement of scholars/guest lecturers:** ensure involvement of high level professionals with a concrete contribution to the delivery of the EMJMD
- ▶ **Publicity / promotion of the EMJMD:** joint website of the course, printed material and student fairs; use of the EU emblem (EU flag) in conjunction with the name "Erasmus+" and in line with the conditions stipulated in the grant agreement, etc.
- ▶ **Quality assurance:** establish an academic board and define relevant standards; examination boards; external / internal evaluation of the EMJMD; quality assurance mechanisms, etc.
- ▶ **Student records:** assessment records for all participating students shared by the partners
- ▶ **Student issues and services to the students:** international secretariat; rights and privileges; resolution of complaints and appeals, etc.
- ▶ **Sustainability strategy:** the consortium's approach beyond the EU funding period

Practical guidelines on aspects recommended to be covered in the Consortium Agreement can be found on the following Agency website:

[http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space\\_en](http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en)

### D.2 JOINT PROMOTION AND AWARENESS-RAISING ACTIVITIES

The EMJMD consortium shall design a joint promotion and awareness-raising strategy in order to ensure the worldwide visibility of the joint study programme aiming to attract the best Master students as well as to promote the Erasmus+ scholarship scheme. These promotion and awareness-raising activities will necessarily include the development of an integrated and comprehensive course website (in English, as well as in the main teaching language if different) prior to their first scholarship application round, providing all the necessary information on the EMJMD for students, future employers and other stakeholders.

In this context, the EMJMD consortium website is a vital tool for:

- promoting the EMJMD study programme and highlight its excellence;
- disseminating information about its structure and content;
- informing potential candidates (students or scholars/guest lecturers) about enrolment conditions, scholarship opportunities and application procedures;
- providing information on the joint programme activities, events, publications, etc.;
- ensuring the necessary networking between students, academics, alumni, future employers and other stakeholders concerned by the EMJMD implementation.

It is therefore of crucial importance that the EMJMD has its own website which can be found easily and has its own URL, independent from the partner universities' websites.

The EMJMD consortium shall adhere to the minimum elements an EMJMD website must include in order to provide adequate, consistent and online information about the study programme, as described in Annex II: "*Minimum requirements and recommendations for student selection & scholarship management*", section A.

### D.3 STUDENT APPLICATION AND SELECTION PROCEDURE

The EMJMD consortium must establish a joint application platform, with common eligibility, selection and admission criteria for their students, as well as for the scholars/guest lecturers that will be enrolled/engaged in the EMJMD. The agreed student selection criteria and admission procedure must adhere to the principles described in the "*Minimum requirements and recommendations for student selection and selection management*" as defined in Annex II of this document and shall be integrated in the Consortium Agreement (see D.1). Any changes to the procedure will have to be reported to the Agency in the context of the EMJMD periodic reporting obligations.

The EMJMD consortia must notify the Agency about the composition of each student intake before the start of the academic year. In this context, as part of the regular monitoring of implementation of the action by the Agency, consortia must for each intake duly encode in the EMT **no later than 15.04** – of the start year of each EMJMD intake – the results of the student selection (students on the main, reserve, or non-scholarship holder lists) based on absolute ranking lists in order of merit for both Programme and Partner Country students.

At this stage, the Agency will monitor, but not validate the results of the student selection. Within its monitoring tasks (e.g. conformity check of the data encoded in the EMT, geographical balance, etc.) the Agency may notify the contact person of the coordinator in case there are deviations from the set rules. In this context, the Agency cannot be made responsible for the validity of the selection results as encoded in the EMT.

Based on the EMT data the Agency will issue information letters to the coordinator comprising the names of students entered in the main/reserve lists. This may serve Partner Country students to obtain their visa for their first mobility in Europe.

### D.4 STUDENT AGREEMENT

It is the consortium's responsibility to ensure the proper participation of all students in the EMJMD activities. In order to guarantee adequate transparency of the EMJMD participation rules, consortia are required to clearly define the student's rights and obligations in relation to his/her Master course studies in a **Student Agreement** that will be signed by both parties following the student's EMJMD course enrolment. This agreement must define as precisely as possible the rights and obligations of both parties and cover the academic, administrative, financial and insurance aspects of course participation and the EMJMD scholarship. In this context, a clause related to the mandatory participation of the students' participation in evaluations/surveys conducted by the consortium and/or the Commission/Agency shall be incorporated in the student agreement. It should also include provisions on the students' joining the "*Erasmus Mundus Students and Alumni Association (EMA)*". Indicative guidelines related to a student agreement are outlined in a document published on the Agency website:

[http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space\\_en](http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en)

A copy of the model student agreement will have to be submitted to the Agency together with the "*Technical report*" **by 31.10.2016**. Any changes to this document will have to be reported to the Agency in the context of the EMJMD periodic reporting obligations.

## E. MANAGEMENT OF THE EMJMD SCHOLARSHIPS

### E.1 GENERAL PRINCIPLES

An EMJMD course is entitled for the maximum budget indicated in the grant agreement which should cover at least 39 Heading 1 scholarships and a maximum of 15 Heading 4 scholarships (geographical windows) for the entire duration of the course implementation, i.e. for the total of the three consecutive student intakes. The indicative number of Heading 1 scholarships (differentiated between Programme and Partner Country students) and of Heading 4 scholarships (specified for each geographical window financed by the different EU external action funding instruments) awarded to each of the EMJMD consortia selected in 2015 is stipulated in *Annex III – Estimated budget of the action* of the grant agreement.

Whenever an EMJMD has been awarded Heading 4 scholarships under the EU external funding instrument Development Cooperation Instruments (DCI) and for the geographical windows Asia (Region 6), Central Asia (Region 7) and Latin America (Region 8) the following requirements have to be respected as regards the selection of scholarship holders:

- ▶ For Asia (Region 6):  
at least 65% of the scholarship holders must come from Least Developed Countries<sup>6</sup> and the remaining scholarship holders should come from the rest of the region, with the exception of China and India.
- ▶ For Central Asia (Region 7):  
if there are sufficient eligible candidates, at least 65% of the scholarship holders must come from Low or Lower Middle Income Countries<sup>7</sup> and the remaining scholarship holders should come from the rest of the region.
- ▶ For Latin America (Region 8):  
at least 25% of the scholarship holders must come from Lower Middle Income Countries<sup>8</sup>, and a maximum of 35% of scholarship holders from Brazil and Mexico together. 40% should come from the rest of the region.

EMJMD scholarships are awarded to students for mobility tracks in accordance with the Erasmus+: EMJMD requirements. The conditions for these mobility trajectories comprise among others:

- EMJMD student scholarships cover the entire duration of the Master course and are awarded exclusively for a full-time enrolment in one of the course editions. Scholarship candidates must have already obtained a first higher education degree<sup>9</sup> or demonstrate a recognised equivalent level of learning according to national rules and legislation in place.
- Students who have already obtained an EMJMD scholarship or are former Erasmus Mundus Master/Doctoral Course scholarship holders are not eligible for an additional scholarship under the EMJMD action. Students benefiting from an EMJMD scholarship cannot benefit from another EU grant while pursuing their EMJMD studies.
- EMJMD scholarship holders must spend at least two complete mobility periods in at least two of the consortium's HEIs acting as partners (not "associated partner" HEIs) and which are located in different Programme Countries. Each of these mandatory mobility periods must include a volume of study/research or equivalent (e.g. internship, thesis preparation) corresponding to at least:
  - 20 ECTS for study programmes of 60 ECTS credits;
  - 30 ECTS for study programmes of 90 and 120 ECTS credits.

The mandatory mobility periods cannot be replaced by virtual mobility neither can they take place in institutions outside the consortium.

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<sup>6</sup> Afghanistan, Bangladesh, Bhutan, Cambodia, Laos, Myanmar, Nepal

<sup>7</sup> Kyrgyzstan, Tajikistan, Uzbekistan

<sup>8</sup> Bolivia, El Salvador, Guatemala, Honduras, Nicaragua, Paraguay

<sup>9</sup> Candidates who will only obtain their first higher education degree at the end of the academic year preceding the EMJMD student intake concerned by the EMJMD scholarship can nevertheless apply for a scholarship and can be selected by the consortium, under the condition that the student obtains the required degree prior to the beginning of the Master course intake concerned.

- 10
- Mandatory mobility periods not fulfilling the eligibility criterion as described in the bullet point above will be considered ineligible for the periods corresponding to (the) missing period(s) that would have allowed respecting that criterion.
  - Mandatory mobility periods not fulfilling the above-mentioned minimum ECTS credits requirements will be considered ineligible when determining the final amount of the grant.
  - Additional study (/research /placement /thesis preparation) periods can take place in other participating organisations from Programme or Partner countries, under the condition that the activities concerned are implemented under the direct supervision of one of the consortium partner HEIs.
  - Scholarship holders spending part of the EMJMD course in their country of residence are not entitled to benefit from the monthly subsistence allowance for this period.
  - The monthly subsistence allowance is not given to scholarship holders from a Partner Country for the EMJMD periods exceeding three months (indicatively the equivalent of 15 ECTS credits) spent in any Partner Country.
  - Mandatory mobility periods at higher education institutions located in a Programme Country (forming the minimum eligible EMJMD consortium) must be fully recognised by the consortium's beneficiaries and must be linked to a valid degree (joint, multiple/double).
  - A minimum of 75% of the EMJMD Heading 1 scholarships must be earmarked for Partner Countries students (i.e. a maximum 25% of the EMJMD scholarships can be earmarked for Programme Countries students). If this ratio is not achieved at the end of the three student intakes covered by the grant agreement, then the Agency will reduce the final eligible EMJMD grant as follows:
    - calculate the difference between the number of Programme Country scholarships awarded and actually paid to students, and the maximum number of Programme Country scholarships by applying the 25% ratio to the actual number of EMJMD scholarships reported in the final report;
    - the difference will be multiplied with the average cost (over the three intakes) of a Programme Country scholarship as reported in the final report;
    - the amount which results from this calculation will be deducted from the final grant determined at final report stage.
  - Without prejudice to academic excellence, EMJMD scholarships must be offered to students by taking geographical balance into account, i.e. no more than 3 candidates from the same country (/with the same nationality) must be awarded an EMJMD scholarship during the same intake. In this context, unduly awarded scholarships will be declared ineligible and any amounts paid will be deducted from the final grant. Students with a double nationality must specify the nationality under which they submit their scholarship application.
  - EMJMD scholarship holders must spend their studies/research periods in Programme Countries represented in the consortium as defined above. In case the EMJMD consortium includes beneficiaries or associated partners from Partner Countries, then:
    - scholarship holders (from both Programme and Partner Countries) can spend a learning/training/research/fieldwork period for the remaining duration of the study programme (i.e. 20 ECTS credits for a one-year Master course, 30 ECTS credits for study programmes of 90 ECTS and 60 ECTS credits for study programmes of 120 ECTS credits) in these Partner countries.

**The conditions related to the contribution to the subsistence allowance for Partner Country scholarship holders stipulated in section C.2, continue to apply. Periods in excess of this duration shall not be covered by the EMJMD scholarship.**
  - Consortia must duly encode the data relating to an EMJMD intake in the EMT by taking account of the guidelines provided in the "*EMT User Manual*".

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<sup>10</sup> EMJMD scholarship holders must spend two complete mobility periods in at least two of the consortium's HEIs acting as partners (not "associated partner" HEIs) located in different Programme Countries

The encoding of data in the EMT relating to the EMJMD scholarship holders, as well as to the scholars/guest lecturers shall among others allow crosschecking of:

- the students nationality (country);
- the students place of residence (country);
- the HEI awarding the ECTS credits for each student mobility period of the EMJMD
- the location of the mobility study period undertaken by the student in the framework of the EMJMD
- the amount of travel contribution received;
- the amount of installation contribution received (if applicable);
- the amount of participation costs charged as compared:
  - to the amount indicated in the EMJMD website for the students' enrolment,
  - to the amount stipulated in Annex III of the grant agreement;
- the duration of the study periods of each scholarship holder in order to ensure that:
  - the correct number of monthly subsistence allowances has been paid,
  - the required ECTS credits have been obtained;
- the engagement of scholars/guest lecturers in terms of duration and academic activities carried out.

In case of doubts, complementary information will be requested from the coordinator. The Agency reserves the right to reject a report on implementation and/or a request for further pre-financing, if data are not complete and/or inconsistent. In this context, the level of consumption of the EU grant encoded in the EMT must equal the amount of the pre-financing payment(s) spent as declared in the financial statement(s).

## **E.2 PAYMENT MODALITIES**

### **E.2.1 General provisions**

The Agency pays the EU grant (management lump sum and student scholarships funds) to the coordinator in accordance with the payment arrangements laid down in Article I.4 of the grant agreement.

Any partner organisation whose data does not appear in the original application submitted by the coordinator or whose participation in the EMJMD course has not been approved in advance in writing by the Agency – following an amendment request sent by the coordinator – will not be recognised as such in the framework of the grant agreement, and as a result, all costs relating to such a partner will be considered ineligible.

The EMJMD consortium pays the scholarship funds to the EMJMD scholarship holders in accordance with the general principles indicated above, as agreed within the consortium (consortium agreement), as fixed in the Student Agreement, and according to the following general principles:

- The monthly allowance can only be paid as from the month of arrival of the student at the first host HEI and after formal enrolment to the course. If students decide to voluntarily join the programme at an earlier stage, then this period must not be considered as part of the EMJMD's course duration. This rule also applies to cases of late arrivals of students to the course.
- The EMJMD programme does not foresee any restrictions for remunerated work outside the scholarship activities provided that:
  - it is in line with the national legislation of the country(ies) concerned (e.g. the visa or residence permit allows it, and the terms of the Student Agreement allow it);
  - the scholarship holder can dedicate the necessary time and efforts to the EMJMD's mandatory activities in order to successfully complete the entire study programme within the agreed study duration.
- An EMJMD scholarship holder may receive additional funding for study/research activities as long as these are not from other EU funding sources/programmes.
- **The payment of the scholarship to a scholarship holder in a currency different to EURO shall be made by using the daily exchange rate on which the scholarship holder is paid and ensuring that the student concerned always receives the EURO counter equivalent, thus any exchange rate gain/loss is to be managed by the beneficiaries. If applicable, this provision must be quoted in the Student Agreement (see section D.4).**

- The regular scholarship payments to the student can only be stopped if the student is expelled or released from the course, blocked from entry in the country of mobility by national authorities, or leaves the course on own demand. The scholarship payments cannot be used by the consortium as a "conditionality" mechanism e.g. to improve academic performance, ensure presence/participation etc.
- Cash payments to students – though accepted in exceptional cases only – must be substantiated by receipts duly dated and signed by the students in question, and must be kept by the beneficiaries in the event of checks/audits (see section H).
- The consortium shall be held responsible for any amount paid to students/scholars which is not due. Undue amounts are those that neither comply with the EMJMD eligibility criteria and the provisions stipulated in the grant agreement and its annexes, nor with the consortium's specific eligibility/selection criteria. Any such unduly paid amounts may be recovered by the Agency even if those amounts were actually paid to students or scholars.
- The consortium shall be held responsible for any amount overpaid to the students/scholars. Overpaid amounts are considered to be payments made to students/scholars for a period in which they were not actively participating in the programme, e.g. a student having received an instalment for month "n" whereas s/he has left the programme in month "n<sup>-1</sup>".
- The payment of the scholarships finishes with the end of the academic year of the respective student intake and no later than three (3) months after the official end of the EMJMD intake. Depending on the length of the study programme it cannot exceed the maximum number of instalments foreseen.

This covers also the cases where a student graduates before the actual end date of the course. Any possible exceptions to this should be treated as described under section B.1.3 of this handbook.

## E.2.2 Student scholarships

- The contribution to travel and installation costs (details see C.2 above) shall be paid in full to the student as follows:
  - Contribution to travel costs:
    - ▶ for 60 ECTS credits courses: the full amount upon arrival at the first host HEI;
    - ▶ for 90/120 ECTS credits courses: the full amount for year 1 upon arrival at the first host HEI, and the full amount for year 2 upon beginning of the third semester. The amount paid to the student for year 2 remains unaffected should the student drop-out or be expelled after the third semester and before graduation.
    - ▶ any unspent travel costs (e.g. a student drops-out before the third semester or the difference between maximum contribution awarded and actual contribution paid) can be accumulated and transferred to the next intake(s) and form part of a full EMJMD scholarship that can be awarded to a student of that intake.
  - Contribution to installation costs:
    - ▶ shall be paid in full upon arrival at the first host HEI of the student resident in a Partner Country.
- The contribution to the participation costs (details see C.2 above) can be charged directly by the consortium to the individual student scholarship. The amount of participation costs charged to the scholarship holder must be clearly specified in the Student Agreement which is to be signed between the student and the consortium.

In case a student drops out before graduation, the participation costs can be charged to the EMJMD scholarship as follows:

- for 60 ECTS credits courses:
  - ▶ participation costs can be fully charged to the scholarship, i.e. no reduction for drop-out cases during a one-year course;
- for 90/120 ECTS credits courses:
  - ▶ should the student drop-out before the beginning of the third-semester mobility, then the participation costs for year 2 cannot be charged on the scholarship;
  - ▶ should the student drop-out during or after the third semester mobility, then the participation costs for year 2 may be charged to the scholarship.

- ▶ any unspent participation costs (e.g. a student drops-out before the third semester or the difference between maximum contribution awarded and actual contribution paid) can be accumulated and transferred to the next intake(s) and form part of a full EMJMD scholarship that can be awarded to a student of that intake.
- The contribution to subsistence costs (i.e. monthly allowance for living costs – see C.2 above) must be paid in full to the students on a monthly basis and up to the maximum of:
  - ▶ 12 instalments for 60 ECTS credits courses;
  - ▶ 18 instalments for 90 ECTS credits courses;
  - ▶ 24 instalments for 120 ECTS credits courses.

The EMJMD consortium shall be held responsible for any overpayments made to the students and the respective amount shall be recovered by the Agency. Furthermore, it is not allowed to split the payments into more instalments than those indicated above. The payment arrangements of the subsistence allowance must be in line with the provisions detailed in the bilaterally (consortium / student) signed Student Agreement.

### E.3 MANAGEMENT OF THE SCHOLARSHIP FUNDS IN CASE OF NO-SHOW OR DROP-OUT / EXCLUSION FROM THE EMJMD

When student candidates **withdraw** their participation in the Master course before the start of the intake to which they have been admitted, including **no-show** and **cancellation** cases, or EMJMD scholarship holders drop - out from the Masters, then the consortium has the possibility to reallocate the scholarship to another student. Such replacements must be – via the EMT – notified to and approved by the Agency. Additionally the consortium should bear the following in mind:

- The new EMJMD scholarship recipient(s) must have been included in the consortium's relevant **reserve list** of potential EMJMD scholarship holders of the same intake.
- The **geographical balance criterion** must be respected.
- The new scholarship recipient must be able to start the Master course **within the first month** of the academic year, thus be entitled to the award of the **full** EMJMD scholarship for the entire study period.
- A scholarship reallocation of a **drop-out** student (i.e. a student who has started the course and has benefited from the scholarship) to a student on the reserve list and/or non-scholarship holders of the same intake **is not allowed**.
- In case **no-show and/or drop-out students** cannot be replaced, the corresponding unspent amounts of the scholarships must be accumulated, transferred and consumed in the next intake(s), thus forming **full scholarships**<sup>11</sup> of Programme or Partner Country students.
- During the **third intake**, if a student **drops-out** after the start of the Masters course and/or the remaining budget accumulated by the consortia during previous intakes is not sufficient to award a **full** EMJMD scholarship at the beginning of the last intake, then the unspent amount will need to be reimbursed to EACEA.

In addition for Heading 4 scholarships (geographical windows), in case of a student candidate withdrawal or a scholarship cancellation, the reallocation of the scholarship in the same intake is also possible to an eligible scholarship candidate from a country belonging to any geographical window under the same funding instrument (see page 7). However, such reallocation will only be accepted if under the same geographical window there are no eligible candidates to whom the scholarship can be reallocated, i.e. either to a student candidate in the reserve list or to a student intended to participate on a self-paying basis.

At the time of a student **drop-out** (i.e. student decides to discontinue the study programme or resulting from a consortium decision to expel the student), the consortium must encode in the EMT the scholarship amount that was spent up to that moment (i.e. the amounts of the contributions to the student's participation costs, travel/installation costs and subsistence costs) following the correct application of the payment rules laid down in section E.2.2.

Further details on the **withdrawal/no-show** of a student candidate, of a student candidate scholarship **cancellation** and of student **drop-out** cases will also have to be provided in the request(s) for further pre-financing and in the final report.

<sup>11</sup> A full scholarship includes the whole amount of participation, travel & installation, and subsistence costs, which in total corresponds to a maximum of 49 000 EUR. The total amount of a full scholarship is meant to be financed by the EMJMD grant only.

#### **E.4 MANAGEMENT OF THE SCHOLARSHIP FUNDS IN CASE OF COURSE INTERRUPTION**

A scholarship can be put on hold if the student has to temporarily leave the EMJMD course following duly justified and well documented reasons. Such cases relate to medical reasons and/or serious family reasons (e.g. need to temporarily take care of a family member or hospitalisation/death of a family member). In such a case the scholarship payment must be interrupted until the candidate is again physically present at the host HEI and can actively continue pursuing the course activities.

If an EMJMD scholarship holder is not able to finish the course activities within the respective student intake due to the above-mentioned reasons, then the consortium has to find acceptable ways to allow the student to finish the Master within one of the following intakes. If the case concerns the last intake covered by the EMJMD grant agreement, it may be possible to request for an extension of the eligibility period of the grant agreement in order to allow the student(s) from the last intake to finish studies at a later stage while being eligible to receive scholarship payments. The extension cannot exceed 12 months and cannot give rise to additional funding for the consortium or the scholarship holder(s). Such requests need to be formally approved by the Agency in line with the applicable procedures as outlined in section B.1.3 of this handbook.

#### **E.5 PAYMENT OF THE GRANT**

As stated under Article I.4 of the grant agreement, a first pre-financing payment equivalent to **25%** of the grant awarded shall be made to the coordinator within 30 days upon entry into force of the agreement (the date when the last of the two parties signs the agreement), or where required by this Article, following receipt of the financial guarantee.

A second pre-financing payment corresponding to **50%** and a third pre-financing payment corresponding to **25%** of the grant awarded will be made after the Agency has received the relevant formal further pre-financing payment request submitted by the coordinator in the applicable form (see report models as referred to in Annexes V and VI of the grant agreement).

Each request shall be accompanied by the following documents (see G.1 for details):

- a progress report on implementation of the action (*"technical report on progress"*) including the related EMT printouts;
- a statement on the amount of the previous pre-financing instalment used to cover costs of the action (*"statement on the use of the previous pre-financing instalment"*);
- where required by Article I.4.1, a financial guarantee.

The Agency shall have 60 calendar days to both approve the further pre-financing requests and to execute the related pre-financing payments, or to reject the requests and ask for additional supporting documents or information. In case of the latter the beneficiary shall have 30 calendar days to submit the additional information requested or to submit a new request/report.

#### **E.6 BANK ACCOUNT**

The bank account specified in Article I.5 of the grant agreement (as shown by the account identification document issued or certified by the bank concerned) and to which the EMJMD grant will be paid must be:

- established in the name of the coordinator institution (personal accounts are not acceptable under any circumstances);
- established in one of the Erasmus+ Programme Countries;
- denominated in EURO;
- able to identify the payments made by the Agency.

Cash withdrawals from the bank account must be substantiated by receipts duly dated and signed.

#### **E.7 ACCOUNTING SYSTEM / INTERNAL CONTROL**

The beneficiaries must set up an adequate accounting system, which must make it possible to easily retrieve and identify the payment of scholarships to participating students and scholars at any time throughout the period of implementation of the grant agreement until their balances are paid and for a period of five years from the date of payment of the balance for the corresponding action.

All transactions relating to the scholarship scheme must be recorded using a numbering system in which the scholarship scheme is given a specific identifiable number.

As far as possible, the persons responsible for managing the daily activities of the scholarship scheme should not be the same as those responsible for its financial management.

## F. PUBLICITY OBLIGATIONS AND DISSEMINATION AND EXPLOITATION OF RESULTS

### F.1 PUBLICITY

EMJMD beneficiaries must make themselves familiar with the publicity provisions as stipulated both, in the special and the general conditions of the grant agreement in conjunction with the guidelines for beneficiaries available on the following Agency website (please select the Erasmus+ tab):

[https://eacea.ec.europa.eu/about-eacea/visual-identity\\_en](https://eacea.ec.europa.eu/about-eacea/visual-identity_en)

Any communication or publication related to the project, made by the beneficiaries jointly or individually, including at conferences, seminars or in any information or promotional materials (such as brochures, leaflets, posters, presentations, etc.), must indicate that the project has received European Union funding and must display the European Union emblem (EU flag). When displayed in association with another logo, the European Union emblem must have appropriate prominence.

#### ► **Disclaimer:**

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

For other official EU language versions, please consult the following website:

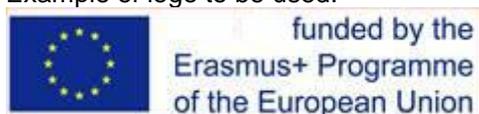
[http://ec.europa.eu/dgs/education\\_culture/publ/graphics/beneficiaries\\_all.pdf](http://ec.europa.eu/dgs/education_culture/publ/graphics/beneficiaries_all.pdf)

#### ► **Erasmus+ logo:**

The project's publications and results that are distributed must carry the Erasmus+ logo and mention:

*"Funded by the Erasmus+ Programme of the European Union"*

Example of logo to be used:



### F.2 DISSEMINATION AND EXPLOITATION OF RESULTS

EMJMD funded projects have the responsibility to put emphasis on dissemination and exploitation of results, as they directly contribute to the impact of the programme and to public awareness of their functioning and results. Beneficiaries must make themselves familiar with the underlying principles and tools and take them fully into account during the project implementation. A first source of information is the Annex II of the Erasmus+ Programme Guide: "Dissemination and exploitation of results – a practical guide for beneficiaries" available at:

[http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space\\_en](http://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en)

Having a strong plan for dissemination and exploitation from the beginning of a project is a key priority and should form an integral part of the EMJMD throughout its lifetime. The objective of dissemination and exploitation is to maximise the impact of project results by optimising their value, strengthening their impact, transferring them to different contexts, integrating them in a sustainable way and using them actively at local, regional, national and European levels.

In order to reach as many stakeholders as possible (e.g. students, scholars/guest lecturers, academics, world of work and other key players in the field of education), it is advisable to translate as many promotion and dissemination materials as possible in English, as well as in the main teaching language(s) if different.

Whenever appropriate, EMJMDs are strongly encouraged to make their results freely available for the public in digital form through the Internet under open licences/open educational resources (OER). Beneficiaries are allowed to define the most appropriate level of open access, including limitations (e.g. interdiction of commercial exploitation by third parties) if appropriate in relation to the nature of the Master course and to the type of material. The open access requirement is without prejudice to the intellectual property rights of the beneficiaries.

The dissemination and exploitation plan should be regularly reviewed, and if necessary corrective action should be taken in close cooperation and in agreement with the Agency.

## G. REPORTS AND FURTHER PRE-FINANCING REQUESTS

### G.1 INTRODUCTION

Monitoring of the EMJMD course implementation is ensured through reports, monitoring visits organised by the Agency, meetings/conferences at EACEA, and by the provision of data encoded by the EMJMD consortium in the EMT – <https://eacea.ec.europa.eu/mobility/>

Reporting is a crucial aspect of the EMJMD course as it allows monitoring, reviewing and assessing:

- the quality of the Master Course as regards reaching its goals and meeting the objectives of Erasmus+;
- the participation of the selected students and scholars/guest lecturers, as well as the payment of scholarships to them;
- the correct handling of the scholarship funds disbursed by the EMJMD consortium to student and scholar grant holders.

In order to ensure an effective monitoring of the EMJMD, different type of reports will have to be submitted during the implementation period of a grant agreement in accordance with Article I.4 and by using the relevant forms specified in Annexes V and VI of the grant agreement.

In particular:

- a **technical report by 31.10.2016** (using the form specified in Annex V to the grant agreement) *covering the reporting period from the starting date of the action stipulated in Article I.2 of the grant agreement until 30.09.2016*, including the copy of the Consortium Agreement signed by all participating organisations and the model Student Agreement;
- a **second pre-financing request** (accompanied by the forms specified in Annexes V and VI of the grant agreement) **by 31.08.2017** *covering the reporting period from 01.10.2016 until 31.07.2017*;
- a **third pre-financing request** (accompanied by the forms specified in Annexes V and VI of the grant agreement) **no later than 28.02.2018** *covering the reporting period as from 01.08.2017*;
- a **final report** covering the whole duration of the action, accompanied by a summary financial statement (forms to use specified in Annexes V and VI of the grant agreement) must be submitted **no later than 60 calendar days after the end date of the action stipulated in Article I.2 of the grant agreement.**

In order to ensure the continuous payments of EMJMD scholarships to students and scholars, EMJMD consortia are recommended to timely submit the further pre-financing requests, as payments by the Agency may take up to 60 days.

As the final report is a key checking and evaluation tool, it must provide a complete and accurate picture of the implementation of the student intakes. Beneficiaries are therefore advised to read the reporting instructions carefully so that they are familiar with the content and aware of the required technical and accounting information required.

### G.2 FORMAL REQUIREMENTS FOR REPORTS

The link to the report templates is indicated in Annex V and Annex VI of the grant agreement. These templates must be used for technical reports, further pre-financing requests and the final report as applicable. The electronic formats of those templates are downloadable from the Agency's EMJMD website "*Beneficiaries space*":

[https://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space\\_en](https://eacea.ec.europa.eu/erasmus-plus/beneficiaries-space_en)

#### **Annex V of the grant agreement:**

**Technical report:** this part is dedicated to the reporting on the implementation and achievements of the project and covers a range of academic and operational questions which relate to the implementation of the EMJMD in its various aspects as from the preparatory year till the end date of the respective reporting period. It should include a description of any management (or other major) difficulties revealed during the reporting period, as well as a declaration regarding any change/ drop-out/ replacement of EMJMD student scholarship holders.

### **Annex VI of the grant agreement:**

**Financial statement:** this part of the report consists of a detailed presentation of the scholarships paid out under the EMJMD scholarship scheme during the whole duration of the grant agreement. The amounts to be declared concern only the EMJMD funding and not any other co-funding amounts that the consortium may have used. The financial statement should show the actual use of the previous pre-financing instalment(s) until the month preceding the date of signature of the financial statement.

In this context, the Agency may request copies of documents relating to the implementation and outcomes of the Master course, e.g. template of the degree(s) and the awarded diploma supplement, students' feedback to evaluation/surveys, scholar reports, etc.

All submitted reports/requests must be accompanied by signed print-outs from the EMT guaranteeing the accuracy and completeness of the data contained therein.

If the technical report, the requests for further pre-financing and the final report do not comply with the formal criteria for admissibility (see "*Administrative checklist*" in the reports form), they will be rejected and new ones must be submitted. If after a written reminder by the Agency the coordinator has not complied with this obligation, the Agency may decide to terminate the grant agreement (Article II.23.3 of the grant agreement). The coordinator will be required to reimburse to the Agency the grant amount already paid and not substantiated by the technical reports and financial statements.

Following admissibility check, if a report/request does not fulfil the minimum requirements from a content (operational verification of proper implementation) and/or financial point of view (breakdown and financial verification of the amounts spent, including check of consistency with the EMT records), it will be rejected or subject to an Agency request of additional information. The assessment of the report and/or the related payment will be suspended until the additional information has been provided or a new report/request has been submitted in the correct form.

The legal representative of the coordinator shall certify that the information provided in the reports and the requests for further pre-financing is full, reliable and true. It shall also certify that the costs incurred can be considered eligible in accordance with the grant agreement and that they are substantiated by adequate supporting documents that can be produced in the context of checks or audits (see section H hereafter).

Approval of the requests for further pre-financing and/or the submission of the final report and of the accompanying documents shall not imply recognition of the regularity, or of the authenticity, completeness and correctness of the declarations and information it contains.

### **G.3 REQUEST FOR FURTHER PRE-FINANCING**

In accordance with Article I.4.1 of the grant agreement, following the first pre-financing payment of 25% of the grant (see E.5 above) the remainder shall be paid in full in two further pre-financing instalments, i.e. a second pre-financing of 50% and a third pre-financing of 25%, subject to having used 70% of the previous instalment(s).

In order to request a further pre-financing, the legal representative of the coordinator needs to fill in and submit the "*Further pre-financing request form*". This payment request must include:

- ▶ "**Technical report on progress**" (Annex V of the grant agreement, as specified above in section G.2)
- ▶ "**Financial statement**" (Annex VI of the grant agreement, as specified above in section G.2)

Following approval by the Agency and in case the statement(s) on the use of the previous pre-financing instalment(s) show that less than 70% of the previous pre-financing instalment(s) paid has been used, the amount of the new pre-financing(s) to be paid will be reduced by the difference between the 70% threshold and the amount used.

When preceding pre-financing instalments (see G.1 above) were not executed in full, a further pre-financing (**4<sup>th</sup> pre-financing**) shall be requested by the coordinator in order to reach the maximum amount of pre-financings. This should allow the EMJMD consortium to be liquid until the end of the third intake, thus fulfil its financial commitments towards the EMJMD scholarship holders and/or scholars/guest lecturers. In this case, a **fourth pre-financing request** (accompanied by the forms specified in Annexes V and VI of the grant agreement) should be submitted **no later than 15.10.2019** and must justify the execution of the remaining amount of the grant.

## G.4 FINAL REPORT

The purpose of the final report is to evaluate both the implementation of the scholarship scheme and the implementation of the Master course throughout the three student intakes. Its further purpose is to financially close the grant agreement. Therefore, all expenditures must have been incurred and all scholarships paid to grantees before the final report is submitted. The final report must be submitted using the forms specified in Annexes V and VI of the grant agreement.

The reporting period of the final report covers the period of project implementation (period of eligibility) set in Article I.2 of the grant agreement.

The assessment of the final report will result in an overall judgment of the quality of implementation of the project and a numerical rating will be given (from 0 to 100). The mark given will reflect the consortium's performance of having effectively implemented the EMJMD not only in line with the various minimum EMJMD requirements but also according to the "*Award Criteria*" of the call for proposals and the "*Description of the action*" in Annex I of the grant agreement. They will also take into consideration how far excellence, the elements of "*jointness*" and the level of course integration defined at application stage have been actually incorporated into the EMJMD.

Copies of supporting documents (payment slips, receipts, bank statements, proof of activities carried out for preparing or implementing the mobility of scholars or students, etc.) do not need to be provided with the report. However, in carrying out a review and analysis of the figures declared in the financial statement, the Agency may ask a beneficiary for further details and copies of the supporting documents. Such a request may also occur as a result of a sampling exercise carried out every year on a number of final reports. In most cases the beneficiary concerned must supply the information requested within 15 days. Failure to do so may result in considering undue any unit or lump sum contribution that is insufficiently substantiated.

In this context, a consortium can always be subject to monitoring visits, checks, audits or evaluations by the Agency and/or the European Commission, which may be carried out either directly by its own staff or by any other outside body authorised to do so on its behalf (see section H of this handbook). Checks, audits or evaluations may be initiated during the implementation of the grant agreement and **for a period of five years** starting from the date of notification of approval of the final report by the Agency (the closure date of the grant agreement), therefore all justifying documents must be kept by the coordinator during this period.

## G.5 DETERMINATION OF THE FINAL EU GRANT AND POSSIBLE REIMBURSEMENT OF PART OF THE GRANT

The Agency will analyse the final report in order to determine the final EU grant. Following this analysis, if the action is not implemented or is implemented poorly, partially or late (e.g. fewer scholarships actually allocated because of a lower number of enrolled students, non-compliance with the minimum ratio of 75% EMJMD scholarships allocated to students from Partner Countries, poor level of "*jointness*" of the course, non-delivery of the diplomas, insufficient involvement of scholars/guest lecturers, etc.), the Agency may reduce the grant initially provided for, in line with the actual implementation of the action and/or due to weak implementation, according to the terms laid down in the grant agreement and its Annexes.

### ► **Poor, partial, late implementation**

As stated in Article II.25.4 of the grant agreement, "*..., if the action is not implemented or is implemented poorly, partially or late, the Agency may reduce the grant initially provided for, in line with the actual implementation of the action according to the terms laid down in the Agreement.*"

Poor, partial or late implementation of the project may be established by the Agency on the basis of:

- the final report submitted;
- the full and accurate implementation of the EMJMD, including the student mobility trajectories and the involvement of scholars/guest lecturers;
- information received from any other relevant source providing evidence that the project is not implemented in accordance with the contractual provisions; other sources of information may include monitoring visits, desk checks or on the spot checks undertaken by the Agency.

## ► **Penalties**

Based on Article I.9.3 of the grant agreement, the reduction shall be applied to the lump sum contribution to the consortium management costs, in the event of poor, partial or late implementation of the action.

The final reports will be rated based on the assessment of the quality of project implementation, where applicable with the help of external experts, using a common set of quality criteria such as:

- the extent to which the EMJMD was implemented in line with the approved grant application;
- the quality of activities undertaken and their consistency with the EMJMD objectives;
- the quality of the practical arrangements provided in support of the mobility, in terms of preparation, monitoring and support to participants during their mobility activity;
- the quality arrangements for the recognition/validation of the learning outcomes of students and the added value to the EMJMD provided by the scholars/guest lecturers;
- the compliance with the publicity obligations and the quality and scope of the dissemination activities undertaken.

The score given will reflect the consortium's overall performance. The rating values – which determine the precise level of reduction of the grant due to poor, partial or late implementation (even if all activities were eligible and actually took place) – run from 0 to 100, where 0 is at the bottom of the rating scale and 100 is at the top. Where the rating falls between 0 and 50, a reduction of the lump sum contribution to the consortium management costs will be implemented according to the following scale:

- 25% reduction if the final report scores at least 40 points and below 50 points;
- 35% reduction if final report scores at least 30 points and below 40 points;
- 55% reduction if the final report scores at least 20 points and below 30 points;
- 75% reduction if the final report scores below 20 points.

In case a reduction of the lump sum to the consortium management costs is applied by reference to the scholar/guest lecturers' engagement as explained in section C.1 (i.e. a reduction of 1 950 EUR to the amount of the lump sum for each scholar week not duly carried out and/or reported), the above-mentioned reduction on the basis of Article I.9.3 shall be applied to the balance herein obtained.

At the "*Technical report on progress*" stage, the same rating system will be used as a means of giving feedback to the EMJMD consortium about its performance. At this stage, the level of rating has no direct impact on any subsequent pre-financing payment. The Agency may decide to reject the report if it does not comply with the set provisions or suspend the payment if it is assessed as particularly weak.

In case the pre-financing payment(s) paid in advance exceed(s) the final amount of the grant approved by the Agency, the coordinator will be requested to reimburse the amount corresponding to the difference between the total amount of the pre-financing(s) paid and the final amount of the grant determined. In this context, a recovery order will be issued by the Agency for the grant agreement in question. The findings of the operational/financial analysis of the final report will be explained to the coordinator in a settlement letter.

## **G.6 APPEALS**

If the coordinator does not agree with the final grant amount determined or the reimbursement claimed by the Agency, then it may submit its observations/an appeal to the Agency. In order to be valid, the observations/appeal must be in writing, signed and dated by the legal representative of the coordinator, and sent to the Agency within 60 days of the date of the settlement letter. The coordinator should set out fully the grounds upon which it disputes the decision of the Agency, together with copies of any relevant supporting documents or justifications upon which it relies. The grounds of the appeal must be based on new elements or facts which were not taken into consideration when the final report was originally analysed. It should be noted that the Agency may reject an appeal which is not submitted within the 60 days period or which does not contain the necessary justifications or documentation.

The coordinator may also request an "**evaluation review**" with the Director of the Agency on the procedural aspects of the evaluation preferably within 30 days of the date of the settlement letter at the following address:

Education, Audiovisual and Culture Executive Agency (EACEA)  
Mr Brian HOLMES, Director  
Avenue du Bourget, 1  
BE – 1049 Brussels  
[Brian.HOLMES@ec.europa.eu](mailto:Brian.HOLMES@ec.europa.eu)

Finally, if the beneficiaries believe there has been maladministration, the coordinator may also lodge a **complaint** to the European Ombudsman in accordance with Article 228 of the Treaty on the Functioning of the European Union (TFEU) within 2 years of becoming aware of the facts on which the complaint is based (see <http://www.ombudsman.europa.eu>).

## **G.7 ADDITIONAL PROGRESS REPORTS**

In addition to the reports detailed in this section, the Agency may, at any time, request the coordinator to produce an additional report on the progress of the EMJMD course and the scholarship scheme, covering both its technical and financial aspects. The purpose of such additional report is to verify that high standards of quality are maintained for the EMJMD and that the scholarship scheme is being managed and implemented in accordance with the rules set out in the grant agreement and its annexes.

## **H. SUPPORTING DOCUMENTS & CHECKS AND AUDITS**

### **H.1 GENERAL REMARKS**

An operational and/or financial audit can be carried out on-the-spot by the Agency or by any other outside body authorised by the Agency at any time. The European Commission, the European Anti-Fraud Office (OLAF) and the European Court of Auditors may also carry out on-the-spot checks and inspections. Such audits may be initiated throughout the period of implementation of the grant agreement until the final amount of the grant is determined and for a period of five years from the closure date of the grant agreement for the corresponding action. In such cases, the coordinator will be notified that an inspection visit will be made.

On receipt of this notification, the coordinator is advised to ensure that all the original documentation likely to be examined by the auditors is available and, if necessary, contact the partners of the consortium in order to collect any documents that may be missing. The audit will cover the use of the lump sum contribution to the management costs of the consortium (namely if and which tasks/activities were actually carried out), as well as the use of the scholarship scheme not only by the coordinator, but also by the beneficiaries.

The beneficiary must be able to provide adequate supporting documents to prove:

- the proper implementation of the corresponding tasks as regards the lump sum contribution to the management costs of the consortium (including the engagement of scholars/guest lecturers); and
- the actual number of units (as far as scholarships were actually paid and deemed eligible) as regards the use of the student scholarship scheme.

In this context, the beneficiary must be in position to identify the actual eligible costs covered by the grant (notably with accounting statements) and to provide supporting documents of actual implementation, in order to prove respectively the amount declared per unit and the amount declared as lump sum.

The purpose of these audits is twofold:

- firstly, to check that the consortium's financial statements presented for payment are consistent with the beneficiaries' basic accounts and to ensure that EU funds are being / have been spent in accordance with the grant agreement and its annexes and that the scholarships scheme is being / has been implemented correctly;
- secondly, audits provide a good opportunity for contact and dialogue between the auditors and the beneficiary. If any management problems are found, the auditors will advise the beneficiary in order to seek a solution and, if necessary, will make recommendations in order to improve existing internal procedures for better managing EU funds. The auditors will take note of any comments and / or suggestions that the beneficiary may wish to make.

In this respect, the basic requirement is transparency. It is essential for the auditors to have access to the sites and premises where the action is or was carried out, as well as to accurate and properly documented necessary information, including information in electronic format. To this effect all original invoices, accounting and tax records, supporting documents proving the actual implementation of tasks and activities related to the Action must be kept for a period of five years from the closure date of the grant agreement.

### **H.2 DOCUMENTS REQUIRED**

In principle, supporting documents must satisfy the following conditions:

- ▶ documents from the coordinator must be original and dated;
- ▶ documents from beneficiaries must be certified copies of the original. However, the Agency reserves the right to have originals made available at any time.

The supporting documents required must prove that the scholarships have been paid out to the selected students and can take the form of payment slips, receipts, invoices, proofs of stays, bank statements, etc. The engagement (mobility) of scholars/guest lecturers in the EMJMD activities encoded in the EMT must be evidenced by their respective reports. Consortia must be able to provide records relating to the selection procedure of scholars.

As a general rule, the beneficiary must provide the auditors with all bank documents, and where applicable receipts signed by the students. The beneficiary accounting records, analytical accounts and annual statements must also be available.

If the beneficiary cannot provide adequate supporting documents or if the supporting documents available do not satisfy the requirements set out in this section, the auditors reserve the right to report the costs in question as ineligible under the EU grant agreement, i.e. the audit report will contain relevant financial findings.

### **H.3 FINDINGS AND OUTCOMES**

Draft audit reports will be sent to the coordinator and where applicable to the beneficiary concerned in order to give the audited consortium the opportunity to comment the audit findings. Those comments (if any) may be taken into account by the auditor before he signs the audit final report.

The Agency will assess the audit final report and will decide whether the audit finding(s) will be fully or partially (or not) implemented. When implementation of audit findings leads to a reduced final amount of the grant, which is lower than the one determined by the Agency at the final report stage, a recovery order will be issued by the Agency for the amount corresponding to the difference between those two amounts. In all cases a copy of the audit final report will be sent by the Agency to the coordinator.

## I. EMJMD MONITORING

### I.1 FIELD MONITORING VISIT

During the life of the grant agreement the Agency (with a possible participation of the National Erasmus+ Offices) will visit the consortium at least once in the context of a field monitoring visit.

Field monitoring visits will be undertaken for all granted projects. It is a management instrument for project follow up and assessment (implementation of the project, quality of the curricula, selection process of the students, added value of invited scholars, etc.). The field monitoring visit should help to ensure that serious problems are avoided through the identification of any difficulties inhibiting the project's successful implementation. In particular, field monitoring is relevant for projects that might be encountering problems as well as for projects which are enjoying particular success. A monitoring visit gives both the beneficiaries and the Agency the opportunity to review the EMJMD against the original award criteria and to identify strengths and weaknesses in the implementation.

This should in no way be seen as an Audit. The financial monitoring will consist in identifying what arrangements are put in place to adequately control and monitor the project implementation and to detect and advise on any possible problems or shortcomings<sup>12</sup>.

The Agency's visit to the coordinating and/or beneficiaries can take place at any time during the lifetime of the EMJMD project. The objectives of the visit are:

- to verify the academic/operational/financial implementation status of the EMJMD in general and the organisation and implementation of the student/scholar mobility in particular;
- to assess the progress of the course in relation to its original aims and objectives;
- to assess the quality of the project implementation, including e.g. excellence, relevance, "jointness" and sustainability of the course;
- to see how well the beneficiaries are cooperating; and
- to provide the project with support and guidance.

The Agency will confirm in advance and in writing the purpose of the visit, the issues to be addressed and, where appropriate the list of documents that should be made available or submitted in advance.

The Agency shall also require a time slot dedicated to a meeting with the students taking part in the Masters course – prominently with the EMJMD scholarship holders – and/or if possible with scholars.

During this visit the Agency/Commission representative(s) may wish to use the opportunity to cover specific areas related to project implementation, as well as to cover management issues with the coordinator and other project representatives.

Occasions for monitoring visits:

- visit by Agency/Commission representative(s) to a consortium meeting (accompanied if required by external independent experts);
- visit by Agency representative(s) to the premises of the coordinator/beneficiaries;
- additional project monitoring occasions may occur in response to new needs that arise.

The Agency will provide feedback to the coordinator after any monitoring visit has taken place. The coordinator will receive the main findings and outcomes of the visit and shall share this information with the consortium partners.

Findings of the field monitoring visits (recommendations or shortcomings) shall be followed up in the reports submitted by the coordinator and through desk-monitoring by the Agency. Positive outcomes might be promoted to good practise examples.

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<sup>12</sup> The Agency/Commission are currently revising their monitoring strategy and objectives. Any changes to procedures and monitoring objectives described in this chapter will be communicated to the coordinator in due time.

## **I.2 MEETINGS ORGANISED BY THE AGENCY**

Representatives of the consortium are expected to participate in meetings organised by the Agency/European Commission (indicatively up to two meetings per year). Consortium representatives may be asked to attend meetings/conferences relevant to specific topics related to the content of the EMJMD courses or for promotion purposes. They may also be invited to meet the Agency/European Commission staff responsible for their project in the context of on-going monitoring. Depending on the type of meeting, consortium representatives may also be requested to make presentations on the progress of their EMJMDs or aspects of their content or management.

- Coordinators' meetings organised by the Agency (so called "grant holders/kick off meetings"): The EMJMD contact person (usually the project coordinator for the daily management) have the opportunity to participate in such meetings at the beginning of the project. Kick-off meetings relate to the start of the activities and allow the project coordinator to get familiar with all administrative and financial aspects of the project implementation and the related challenges.
- "Cluster meetings" focusing on a particular subject/topic. Consortium representatives, who have relevant experience in the domain, share their knowledge with other EMJMDs and stakeholders, thus benefitting from mutual learning.

Expenditure related to this participation must be financed by the consortium out of the EU grant lump sum contribution to the management costs.

## **ANNEXES**

**ANNEX I: MINIMUM REQUIREMENTS FOR THE HEALTH AND ACCIDENT INSURANCE COVERAGE OF EMJMD STUDENTS**

**ANNEX II: MINIMUM REQUIREMENTS AND RECOMMENDATIONS FOR STUDENT SELECTION & SCHOLARSHIP MANAGEMENT**

## **Annex I. MINIMUM REQUIREMENTS FOR THE HEALTH AND ACCIDENT INSURANCE COVERAGE OF EMJMD STUDENTS**

The purpose of this annex is to set the minimum required level of the obligatory insurance coverage for eligible student candidates who have received a European Union grant to study in an Erasmus Mundus Joint Master Degree (EMJMD) course.

In the context of this document candidates to receive the obligatory insurance coverage by the consortium/partnership are:

- EMJMD student scholarship holders

Consortia should ensure in their contractual relations with the insurance companies that the family member(s) of the insured scholarship holder (grantee) could sign the same insurance coverage without any restrictions related to the age of the family member, making clear that such an extension of coverage will be at the cost of the insured.

Candidates for whom insurance coverage provided by the consortium/partnership is not obligatory are:

- EMJMD scholars / guest lecturers

Cover must take effect by the time the EMJMD scholarship holder starts its journey to participate in the Master course (maximum two months prior to the start of the specific EMJMD intake to which the grantee is enrolled) and must be valid until two months after the end<sup>1</sup> of the same intake, unless there is a prior end to the EMJMD grantee status<sup>2</sup>.

Each EMJMD consortium shall be responsible for the respect of any local legislation as far as insurance is concerned, such as – for example – the compulsory affiliation to a mutual insurance company.

### **Results to be obtained:**

- ▶ The insurer must provide high-quality insurance services to cover EMJMD student scholarship holders in relation to certain risks such as illness, accident, death, permanent disability, third-party liability etc.

High quality services, among others, are for example a call-centre accessible 24h/24h with operators speaking English, French, German and Spanish during at least 80% of the time (with local assistance back up available 24h/24h if needed), availability of the specific insurance cards (indicating the name of the insured person) within maximum 10 days, etc.

- ▶ The cover must automatically be provided by the consortium/partnership's chosen insurer to all EMJMD student scholarship holders for their mandatory as well as non-mandatory (if relevant) mobility study periods in both Programme and Partner countries.
- ▶ The cover must include all worldwide travel required for the participation in the EMJMD.

Reasons for travel may be:

- departure to the destination where the action will take place;
- travel between the participating Higher Education Institutions (HEIs);
- return trip home following completion of the action or during the academic breaks within the specific eligibility period of the action;
- preparatory meetings;
- mid-term evaluation meetings;
- final evaluation meeting;
- courses, conferences, seminars, research, cultural and intercultural sessions.

In the event of a return trip home during the period covered by the EMJMD scholarship the participant shall also receive cover for medical costs and urgent dental care. This coverage must be guaranteed for periods up to 4 weeks.

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<sup>1</sup> "The end" is understood as the last official activity in the context of the intake; this is usually the graduation ceremony.

<sup>2</sup> Change in status is considered to be taking up an activity other than that for which the grant has been awarded.

**The insurance contract must cover all the risks set out in points A to G below:**

**A. Conditions that must apply**

- Non deductible
- Non-permanent and non-chronic mental disorders will not be accepted as exclusions

**B. Sickness/pregnancy and childbirth/accident**

This must cover out-patient and hospital expenses as a result of sickness, pregnancy, childbirth or accidents arising during the period of cover. It must make provision for direct payment of all hospitalisation costs.

100% cover must be provided in respect of:

- Doctors' fees
- Medicines, examinations and analyses prescribed by a physician<sup>3</sup>
- Urgent dental care following an accident
- All hospital expenses and surgical fees (including advances on hospital expenses)
- Repatriation in the event of serious illness or accident

Cover must be total in respect of these services. Pregnancies at stage less than 6 months, at the moment of departure from the home country to participate in the action, shall not be excluded from cover.

**C. Death**

Cover must be provided around the clock and must include death during the period of cover following accident, whether or not it is attributable to the trans-national EMJMD activity.

Cover in the event of death must include, in all cases, even suicide:

- Transport of the mortal remains to the place chosen by the deceased's family
- Funeral and laying-out costs
- The cost of the coffin

**D. Permanent invalidity**

Eligible candidates must have round-the-clock cover against partial or full disability of a permanent nature resulting from an accident. The cover must not be restricted to a disability directly attributable to the performance of the trans-national EMJMD activity.

**E. Third-party liability**

Eligible candidates must have round-the-clock cover against financial consequences of third party liability, by virtue of the legislation or case-law of the host country, occasioned by physical or material damage to third parties.

In all cases, this cover must extend to the eligible candidates' host HEIs where the eligible candidate's action may devolve third-party liability to them.

**F. Theft and loss of documents**

Eligible candidates must be insured against the risk of theft and loss of the following documents:

- Identification documents (e.g. identity card, passport, etc.)
- Travel tickets

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<sup>3</sup> For urgent dental care without accident the amount covered must be up to a minimum of 250 EUR per year

### **G. *Supplementary assistance services***

Supplementary assistance services may be offered separately, provided that they comply with the minimum conditions set out in the specifications. Examples of such services are:

- Travel expenses for family members in the event of the eligible candidates' death, serious illness or serious accident
- Early return in the event of a serious illness or accident affecting a close family member, etc.

## **Annex II. MINIMUM REQUIREMENTS AND RECOMMENDATIONS FOR STUDENT SELECTION & SCHOLARSHIP MANAGEMENT**

This annex describes the basic elements and minimum requirements for the selection of Erasmus Mundus Joint Master Degrees (EMJMD) students (section A), as well as for the management of EMJMD scholarships (section B). It is meant to safeguard the application of the Erasmus+: EMJMD rules as well as provide support and guidance in the actual scholarship management process.

**Section A.** focuses on the student selection process, concerning both EMJMD scholarship holders and students admitted to the Master course without an EMJMD scholarship. It presents a set of minimum requirements to be followed during this process as well as guidance on how best to manage the most crucial parts of the process.

**Section B.** provides information and guidance on how to proceed during the EMJMD scholarship application process, and how to manage the EMJMD scholarship attribution and monitoring in the EACEA mobility tool (EMT).

## **Section A. STUDENT SELECTION PROCEDURE**

The Erasmus+ Programme requires that an EMJMD has a joint application, eligibility, selection and admission criteria for their students as well as for the scholars / guest lecturers engaged by the consortium. This section presents a set of minimum and mandatory requirements to be followed during the student selection procedure.

The selection procedure and criteria are to be designed and agreed upon by all members of the consortium and be implemented during the three intakes covered by the grant agreement. Any changes to the procedure will have to be reported to the Agency in the context of the EMJMD periodic reporting obligations.

### **A.1 EMJMD WEBSITE**

The consortium website is a vital tool for:

- Promoting the programme
- Disseminating information about its structure and content, its excellence and innovative character
- Informing potential candidates (students or scholars/guest lecturers) about its enrolment conditions, its scholarship opportunities and the application procedures
- Providing information on the joint programme activities, events, publications, etc.
- Ensuring the necessary networking between students, academics, alumni and other stakeholders concerned by its implementation

It is therefore of crucial importance that each Erasmus+ EMJMD has its own website which can be found easily and has its own URL, independent from the partner universities' websites. The recommendations hereafter represent the minimum elements that an EMJMD website must include in order to provide adequate, consistent and online information about the study programme.

#### **Website standard elements**

The website includes a Legal Notice and standard statements:

- a. Disclaimer on contained data.
- b. Information relating to individuals (personal data) is collected and used in accordance with the [Regulation \(EC\) N° 45/2001](#) of the European Parliament and of the Council of 18.12.2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data (OJ L8 of 12.1.2001, p. 1)<sup>1</sup>.
- c. Indication of the latest update for each (/its most relevant) pages/sections.

#### **Erasmus+ EMJMD website – General**

- a. The joint programme is clearly identified as "Erasmus+: Erasmus Mundus".
- b. The logo of the European Commission with the "Erasmus+" wording, and guidelines on the visual identity for Erasmus+ is available at:  
[https://eacea.ec.europa.eu/about-eacea/visual-identity\\_en](https://eacea.ec.europa.eu/about-eacea/visual-identity_en)  
Annex II of the Erasmus+ Programme Guide contains guidance on the dissemination and exploitation of results and requirements for EU visibility on project outputs.
- c. The website information is available in English. It may also be available in further languages, in particular the EMJMD's taught languages.

#### **Joint study programme offered by the EMJMD**

- a. The website displays the EMJMD's title and acronym.

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<sup>1</sup> For further information please consult the EACEA privacy statement:  
[http://eacea.ec.europa.eu/sites/eacea-site/files/privacy\\_statement\\_contact\\_form\\_eacea\\_website\\_final\\_en.pdf](http://eacea.ec.europa.eu/sites/eacea-site/files/privacy_statement_contact_form_eacea_website_final_en.pdf)

- b.** The institutions that are members of the EMJMD consortium are clearly identified with:
  - a link to the relevant pages of their institutional website;
  - contact addresses (/persons) for the joint programme.
- c.** The website includes a short description of the joint programme, notably regarding:
  - its content and structure including the different mobility (/specialisation) tracks and/or research topics;
  - if applicable, the placement / internship possibilities offered;
  - main objectives and expected outputs;
  - tuition / training / research languages;
  - final degree(s) awarded – in English and the actual delivery language(s) – including, if applicable, the joint diploma supplement.
- d.** The website provides a comprehensive description of the joint programme contents (either on specific pages or in a separate and downloadable document) including:
  - the list of mandatory and elective courses / seminars / training modules with their corresponding number of credits (if applicable);
  - the nature, timing, required outputs, etc. of the on-going and final evaluation (tests, exams, projects, thesis, etc.);
  - the evaluation grid(s) and minimal results required to pass;
  - re-sit possibilities, procedure and timing;
  - the academic staff responsible for the EMJMD content in the different partner institutions.
- e.** If applicable, the associated partners are listed with an indication of their role in the joint programme and the respective services they provide to the students.
- f.** The website includes a link to the Consortium Agreement signed by the partner, which provides detailed information on the consortium organisation and internal management.

### **Student admission requirements**

- a.** The website contains a specific section describing the students' admission requirements and application procedure, including:
  - the student "participation costs" (/enrolment fees), what these fees cover, and what other "extra costs", if any, will have to be covered by the student;
  - if applicable, the different participation costs amounts for students candidates from Programme and Partner Countries, indicating clearly the conditions applicable to each of these two categories;
  - the academic achievements (if applicable, in ECTS credits) and linguistic competence required to enter the joint programme;
  - the support documents required.
- b.** The student application form is available online (either through a downloadable template or via a web based application form).
- c.** The student admission conditions/requirements specifies the different scholarships available (including the EMJMD one) and provides specific pages describing the conditions and procedure for applying for these scholarships;
- d.** The website provides a link to the "Student Agreement" template used by the consortium and that specifies in detail the rights and obligations of the two parties (student candidate and consortium).

### **Erasmus+ EMJMD scholarship**

- a.** The website specifies the type of EMJMD scholarships offered:
  - explaining the different eligibility criteria applicable to Programme and Partner Country students (including the 12-month residency rule to a Programme Country);
  - providing a detailed timetable for application and communication of selection results;
  - indicating the maximum number of applications a student candidate can introduce;

- indicating:
  - the total scholarship amount;
  - the detail of its different components (travel and installation, contribution to the participation costs, monthly allowance);
  - the amount that will be actually allocated to the student;
  - the services they will be offered with the part of the scholarship charged by the consortium (including the mandatory insurance scheme for students).
- b. The EMJMD scholarship application form is available on line (downloadable or via an online application tool).
- c. The students are informed about the fact that their personal data will be sent to the Agency and may be used by other bodies involved in the management of EMJMD acting as stakeholders of the programme (i.e. European Commission, Erasmus+ National Offices, EU Delegations, Erasmus Mundus Students and Alumni Association) for facilitating the student access to the joint programme.
- d. The appeal procedure following the rejection of a scholarship application is clearly explained and the relevant conditions and appeal form are provided.
- e. Specific contacts are provided for additional information of the scholarship application procedure.

### **Other useful information**

- a. The website contains a FAQ section.
- b. There is a link to the Erasmus Mundus Students and Alumni Association (EMA: <http://www.em-a.eu/>) homepage and, if applicable, to the specific joint programme alumni association.
- c. The website contains practical information and useful links for each of the countries represented in the consortium (visa and residence permits requirements, socio-cultural aspects, accommodation, cost of living, etc.).

### **Additional elements within your website not listed above**

Any additional information concerning your website content you may consider as useful for existing and future Erasmus+ EMJMD consortia.

## **A.2 STUDENT APPLICATIONS**

Information concerning the application procedure, timetable (deadline for application, estimated time for the notification of results, appeal deadline, etc.), eligibility and selection criteria must be available to all potential applicants **at the latest three (3) months before the scholarship application deadline.**

Consortia must make the student candidates aware of the fact that they can apply for an EMJMD scholarship to any of the Erasmus+ Erasmus Mundus courses of their choice (see the EMJMD catalogue website available under the following link:

[http://eacea.ec.europa.eu/erasmus-plus/library/emjmd-catalogue\\_en](http://eacea.ec.europa.eu/erasmus-plus/library/emjmd-catalogue_en)),

but for a given academic year the number of applications must be limited to maximum three different joint programmes.

Although consortia are free to define different requirements, eligibility and/or selection criteria for the different mobility/specialisation tracks they offer, these should be clearly indicated in the scholarship application documents. However, while the consortium can ask for the student's "preferred" mobility tracks (/host institutions), in order for instance to ensure a balanced distribution of students among the different partners, such mobility preferences cannot play a role when selecting the scholarship candidates nor when selecting a "reserve list" student in case of cancellations from the "main list" students (see also the EMT).

The application form contains all the data listed below:

- personal co-ordinates of the candidate;
- year of birth;
- (European format) CV;

- proof of nationality<sup>2</sup> (copy of passport);
- proof of place of residence (e.g. residence certificate and certificate from the candidate's place of work, study or training – see section C.2.2);
- certified (translated) copy of university diplomas;
- certified (translated) transcript of study results;
- (certified copy of) language test results;
- (if applicable) preferred mobility track;
- motivation letter;
- recommendation letters and references;
- description of the eligibility criteria for an EMJMD scholarship<sup>3</sup> and declaration from the candidate that these criteria are fulfilled;
- description of the selection criteria, procedure and timetable.

### **A.3 SUBMISSION, REGISTRATION AND ELIGIBILITY CHECK OF STUDENT APPLICATIONS**

It is the consortium's responsibility to ensure that all candidates proposed for an EMJMD scholarship (on the "main list" and on the "reserve list"), fulfil the EMJMD scholarship holder's eligibility criteria.

In this context, the eligibility check on applications is performed either by:

- the coordinating institution only;
- the coordinating institution and some partner institutions; or
- the whole consortium.

The eligibility check covers all the aspects listed below:

- respect of application deadline;
- completeness of the application file;
- eligibility of the candidate in relation to the EMJMD criteria.

All applications are subject of an acknowledgement of receipt.

The eligibility decision on student applications is taken either by:

- the coordinator/partner institution(s) that performed the check; or
- an "Eligibility Committee"

If the composition of the "Eligibility Committee" is different from the Selection Committee its composition must be specified in the "Technical report".

Ineligible applicants must be:

- informed immediately after the eligibility check;
- provided with the reasons of ineligibility;
- provided with information on the appeal procedure.

### **A.4 QUALITY ASSESSMENT OF ELIGIBLE APPLICATIONS**

The assessment of candidates applications is performed in accordance with joint selection criteria agreed among the consortium partners and involves the partner institutions as well as external bodies (if applicable). The assessor(s) involved in the assessment of applications must sign a "Non-conflict of Interest" declaration, so as to ensure equal treatment of the student candidates. Each eligible EMJMD scholarship application may be assessed by:

- one assessor;
- two assessors;
- more than two assessors.

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<sup>2</sup> Candidates with multiple nationalities must decide at application stage under which one nationality they apply.

<sup>3</sup> Nationality and residence, 12-months residency rule, non EMMC (Erasmus Mundus – Action 1) scholarship holder previously, etc.

The assessor(s) can be member(s) of either:

- the coordinating institution only;
- some of the partner institutions;
- all partner institutions;
- organisations that are not partners of the consortium.

If other actors are involved in the assessment they must be specified in the "Technical report".

The quality assessment must take into consideration the criteria listed below (non-exhaustive list):

- very good/outstanding study results (= academic excellence) in the relevant study areas;
- academic potential;
- level of language skills;
- motivation;
- recommendations;
- work experience and professional qualifications (if applicable);
- results of interviews (if applicable).

### **A.5 STUDENT SELECTION**

The selection exercise must result in an absolute ranking list of candidates in decreasing order of merits, split in two different groups, i.e. one for Programme Country candidates and another for Partner Country candidates.

In this context, it must be ensured that the selection decision is based on the ranking list(s) and that it includes the "*main*" and "*reserve list*" of selected students under each of the two categories of scholarships. The two "*reserve lists*" must reflect the absolute ranking order of scholarship candidates.

The minutes of the "Selection Committee" meeting (the selection decision) must be signed by all its members (who must have signed in advance a declaration of "*Non-conflict of interest*") and be included in the "Technical report", comprising information about its composition and the origin and function of the members.

It is the consortium's responsibility to ensure that all the candidates proposed for an EMJMD scholarship have the necessary academic (/linguistic) expertise to actively follow the joint programme and have serious chances to conclude their EMJMD study period successfully.

In the event that EMJMD scholarships have been offered to students who did not have the required (/minimal) academic (/linguistic) knowledge at recruitment stage, the Agency may decide to request the full reimbursement of the scholarship amounts concerned.

At the end of the students' selection and at the latest by the deadline to encode the data of all selected (main and reserve lists) and non-selected<sup>4</sup> students in the EMT (no later than 15.04 preceding the start of each intake), must be ensured in accordance with the instructions and requirements on how to create and manage the main, reserve and non-selected lists of scholarship candidates specified in the "*EMT User Manual*" and in Section B below.

Non-selected student candidates must be:

- informed immediately after the selection decision;
- provided with the reasons of being rejected;
- provided with information on the appeal procedure.

### **A.6 INFORMATION TO THE APPLICANTS**

Consortia must immediately inform all those applicants who have not been excluded for eligibility reasons about the result of their application.

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<sup>4</sup> "Non selected students" are eligible students who do not fulfil the consortium selection criteria and who would not be enrolled in the EMJMD even on a self-paying basis

It is recommended to inform the main and reserve list students immediately after the Selection Committee decision (in order to allow them to get prepared well in time and to avoid that the candidates apply to other scholarship schemes). In this context, the Agency cannot be made responsible for the communication on the selection results between the consortium and the scholarship applicants.

For the EMJMD students proposed for a scholarship, the notification must include:

- a model of the Student Agreement;
- student guidelines/handbook with practical information on the EMJMD;
- the scholarship amount.

For the students placed on the EMJMD reserve list, the notification must include:

- the results of the quality assessment;
- information regarding the management / use of the reserve list;
- the procedure to follow for an appeal to the selection decision.

#### **A.7 ARCHIVING OF STUDENT APPLICATIONS**

All selected applications are archived (5 years following the closure of the grant agreement) in paper form and/or electronically

The archived applications must include:

- the eligibility assessment(s) for all applications;
- the quality assessment(s) for eligible applications;
- the Eligibility and Selection Committees' minutes.

## Section B. SCHOLARSHIP ALLOCATION AND MANAGEMENT OF CANDIDATES LISTS

### B.1 CREATION OF THE SCHOLARSHIP CANDIDATES LISTS

At the latest by the scholarship application deadline (no later than 15.04), all data related to the student scholarship applicants will have to be encoded in the EMT following the instructions contained in the corresponding "User Manual".

**On the day of the above mentioned deadline, the database will be closed and it will not be possible to include new data or to update the existing one anymore.**

In order to prepare their lists of scholarship candidates, consortia should follow the following approach:

- a. On the basis of their absolute ranking list(s) of candidates, consortia must start including the students in the main list following the order of merits.
  - o Candidates must be separated in two different lists corresponding to the two categories of EMJMD student scholarships, i.e. Programme Country and Partner Country students. Students eligible for a specific "geographical window" must be included under the Partner country list.
  - o If the main list already includes three students with the same nationality, the following students with the same nationality must be placed on the reserve list<sup>2</sup>.
- b. The order of the students in the reserve list must correspond to the order of the students in the absolute ranking list. In this context:
  - o There is one reserve list for Programme Country candidates (including the specific "geographical windows" if applicable) and another one for Partner Country candidates.
  - o If the joint programme includes different admission and selection criteria in accordance with the specialisation/mobility track, these must be clearly specified in the minutes of the "Selection Committee" meeting (the selection decision), as well as in the absolute ranking list, in order for the Agency to validate the replacement of main list candidates by a reserve list ones in cases of withdrawals.
- c. Contrary to the main and reserve list, the data on the "non-selected list" does not need to provide all the details on the candidates but only their nationality and gender. This information can be grouped and recorded in the EMT in groups (e.g. 8 Swedish females, 28 Brazilian males, etc.)

The "non-selected list" includes all the candidates who neither fulfil the EMJMD scholarship eligibility criteria, nor the consortium's joint admission requirements (i.e. student who would not be admitted in the Master course even on a self-paying basis).

In addition to these EMJMD student scholarship lists, prior to the beginning and during the implementation of each intake, consortia will have to keep track of the:

- **"Non-scholarship holders" students' list:** this list available in the EMT will have to include all the students who have enrolled in the EMJMD without an EMJMD scholarship. If a "reserve list" student decides to enrol in the master course on a self-paying basis, he will have to be moved in the EMT from the "reserve list" to the "non-scholarship holders" list (the EMT will indicate the previous status, i.e. registration on the reserve list of the student, in a history log file). Only those self-paying students, that have been **(initially)** listed on the EMJMD reserve list can profit from an EMJMD scholarship in the event of **withdrawal /cancellation /no-show** of an EMJMD student candidate.

Contrary to the main and reserve lists that will be closed by the scholarship application deadline, the "non-scholarship holders list" will remain open for inclusion of new names until the end of October of the academic year concerned, in order to allow consortia to recruit and enrol students up to the beginning of the EMJMD intake.

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<sup>2</sup> This rule applies "per Category" and the geographical windows are considered separate categories. This means that a consortium can include, for instance, three Brazilian candidates on its main list for Partner Country students, another one in the "Latin America – Region 8" window (if applicable), and another three – should they have resided for more than 12 months in a Programme Country during the last 5 years – under the Programme Country main list of students.

- **"Scholar scholarship" holders' main list**<sup>3</sup>: in accordance with the Master course requirements, and in line with the minimum requirements specified in section C.1, consortia are free to determine their own scholars' selection procedure and calendar. The scholar/guest lecturer scholarship data can be encoded in the EMT at any time during the EMJMD implementation in accordance with the specific selection calendar agreed upon by the consortium and no later than the given reporting deadlines.

## **B.2 INFORMING THE SCHOLARSHIP CANDIDATES**

- The consortium informs its "main list" candidates as soon as the selection process has been concluded. This will allow the scholarship candidates preparing their arrival in Europe and, more specifically, obtaining their visa. The consortium will have to do so under its own responsibility, ensuring to avoid any misunderstanding on the enforceability of its notification.
- In its notification to the candidates who have been offered a scholarship, the consortium must provide detailed information on all the necessary elements to enrol in the joint programme on time. For Partner Country scholarship holders this concerns most particularly the visa requirements but also all other cultural, logistic, administrative, linguistic, etc. elements required to ensure an efficient starting of their joint programme activities. The notification must also specify the exact amount of the scholarship, the different elements composing this amount and the way it will be paid to the student during the EMJMD study period.
- Consortia must include in the scholarship notification a deadline by which the students must confirm their acceptance of the scholarship and, for Partner Country students, a request for confirmation, that they have launched the necessary procedures for obtaining their visa for their first mobility in a Programme Country HEI. This may reduce the risk of withdrawals at a later stage and allow for the replacement of withdrawn candidates well in time before the beginning of the intake.
- The notification should also specify the academic/linguistic levels of competence expected from the students prior and during the joint programme, in order to receive and continue receiving the scholarship payments.

Despite of the quality of their student's selection procedures, consortia may be confronted with cases in which the student's actual capacity, skills and/or levels of competence in some crucial areas (linguistic, academic, psychological, etc.) will not allow him/her to participate in the joint programme with serious chances of graduation at the end of it.

In order to address these types of situations, consortia must put in place in the early days of the programme specific evaluation tests that will allow them assessing the student's capacity to efficiently follow the joint programme. The results of these tests will allow the consortium and the student concerned to reinforce individual teaching and learning strategies in order to correct weaknesses in the student academic (/linguistic) levels of competence, and increase his/her chances of success at the end of the programme.

**However, if, after having been given a chance to re-sit, the student's performance is still far below the consortium's minimal performance requirements, the scholarship must be terminated.**

The nature, calendar, expected performance results and consequences in case of failure of these evaluation and performance tests must be communicated to the students prior to their enrolment in the course and specified in the student agreement that they will have to sign with the consortium at the time of the enrolment.

## **B.3 MANAGEMENT OF THE RESERVE LIST**

The replacement of a "main list" student by a "reserve list" one can only be implemented after a relevant requested has been introduced in the EMT in accordance with the procedure described in "User Manual" and accepted by the Agency.

As a result, consortia must avoid sending formal scholarship offers to reserve list students before the Agency has accepted the corresponding replacements.

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<sup>3</sup> As scholars are selected throughout the EMJMD implementation period of the intake in question, there is no need to include them in a reserve list. As soon as the selection decision has been taken by the consortium and the scholar has confirmed his/her acceptance of the scholarship, he/she can be encoded in the relevant EMT main list.

The request to replace a "main list" student by a "reserve list" can be effected only if s/he is replaced by the first eligible candidate on the reserve list. In this particular case, attention should be paid to the EMJMD condition concerning the nationality of the reserve list candidate and to the rule as regards the presence of maximum three nationals from the same country among the scholarship holders for a given category of students (Programme / Partner Country). If this is the case (i.e. there are already three other students with the same nationality on the main list), the consortium will have to take the next eligible candidate respecting its own ranking list<sup>4</sup>.

**In any event, the conditions stated in section E.3 must be duly respected.**

Two exceptions can be accepted to the above mentioned rule.

- a. the first one corresponds to cases where the academic or linguistic background of the first eligible candidate on the reserve list does not correspond to the consortium requirements for the particular mobility/specialisation track concerned and it is not possible to reallocate the student under another track. This exception can only be granted to those consortia that have defined different application requirements in accordance with their mobility/specialisations tracks and that have clearly identified their main list and reserve list students in accordance with these tracks;
- b. the second one results from timing issues when **withdrawal /cancellation /no-show** of a student candidate occurs shortly before the actual beginning of the intake, making it impossible for certain Partner Country nationals to obtain their visa in time, with **no possibility** for the student to follow the initial stages of the programme through e-learning methods or to catch up the missed parts of the study programme - both only within the first month of the Masters course. In this case the consortium can propose another candidate but it will have to demonstrate that those who are better ranked will not be able to join the programme in time.

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<sup>4</sup> In very particular circumstances, where there are no candidates of other nationalities available on the reserve list, the Agency can make an exception to the geographical balance rule. Requests for such exceptions must be clearly justified and are not automatically granted.