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Proposal for a

DECISION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

**establishing an action programme for the enhancement of quality in higher education
and the promotion of intercultural understanding through co-operation with third
countries (Erasmus Mundus) (2009-2013)**

(presented by the Commission)

[SEC(2007) 949]

[SEC(2007) 950]

EXPLANATORY MEMORANDUM

1) CONTEXT OF THE PROPOSAL

- **Grounds for and objectives of the proposal**

Higher education is subject to growing internationalisation in response to the process of globalisation. The Community and its Member States should therefore seek to prepare its citizens for a global environment by including an international dimension in their higher education systems.

The overall aim of the new Erasmus Mundus programme is to enhance the quality of European higher education, to promote dialogue between and understanding for different societies and cultures through co-operation among higher education institutions and people-to-people contacts, as well as to promote EU external policy objectives and contribute to the sustainable development of third countries in the field of higher education. In that sense this proposal represents a new approach and has a wider scope in terms of policy, objectives and types of activities than the current Erasmus Mundus programme.

Higher education institutions (HEIs) are also arenas for inter-cultural dialogue and exchange. An education and mobility programme based on international links and exchanges of individuals can enhance the political, cultural, educational and economic ties between the European Union and third countries.

The Commission has previously outlined its views on the issues which higher education systems and institutions need to address, notably in its Communication "Delivering on the Modernisation Agenda for Universities: education, research and innovation" (COM(2006) 208 final) of May 2006. As part of these efforts, HEIs see the need to establish international links with institutions located elsewhere in the world and to try to attract a large share of internationally mobile students and researchers to their institutions. What is more, Community action in this field has to take due account of the broader context of EU external policy and its cooperation with third countries, in line with the Commission Communication "Europe in the world - some practical proposals for greater coherence, effectiveness and visibility" (COM(2006) 278 final).

HEIs and students from the whole world will be able to benefit from the new Erasmus Mundus programme. The current Erasmus Mundus programme comes to an end in 2008. According to Article 12 of the programme Decision, the Commission has to submit a communication on the continuation of the programme by 31 December 2007.

- **General context**

The number of internationally mobile students seeking an education abroad continues to rise: 1.8 million in 2001, 2.5 million in 2004 and a projected 7.2 million in 2025, 70% of whom will be Asian.

Recent data suggest that competition to attract the "brightest and the best" has become more intense and that some European countries have become major players in the field.

In 2004, six countries hosted 67% of the world's mobile students: the US (23%), the UK (12%), Germany (11%), France (10%), Australia (7%) and Japan (5%). Europe¹ hosted 44% of all international students (or 1.1 million students). International student enrolment rates between 1999 and 2004 grew by 109% for Japan, 81% for France, 45% for Germany, 42% for Australia, 29% for the UK and 17% for the US.

However, Europe lags behind the US on certain crucial academic indicators. In terms of the number of new PhDs awarded annually, the figures for 2003 were 1 167 000 (EU-25) and 1 335 000 (US). The US and Japan are also ahead of Europe when it comes to the employment of researchers. The numbers of researchers per 1000 persons in the labour force in 2003 were 5.5 (EU-25), 9.1 (US) and 10.1 (Japan).

While some European countries have started attracting large numbers of international students, Europe's status as a centre of excellence in learning is not always fully appreciated or understood by third-country universities, nor by students looking for a high-quality international education. Moreover, the vast majority of international students studying in Europe are concentrated in just a few European countries.

A 2006 study on "Perceptions of European Higher Education in Third Countries" shows that students rank the US first in terms of innovation, dynamism and competition (both in higher education and society in general). This contrasts with the perception of a "traditional" Europe, lagging in terms of modernity, capacity for innovation and tolerance. Asian students, who make up the most important market segment, rank the US above Europe in all of the following academic and labour market-related categories: quality of laboratories, libraries and other facilities; quality of education; most prestigious universities; reputation of degrees; chances of getting a job and staying on after graduation; work opportunities during studies.

Europe's cultural and linguistic diversity is also regarded as a challenge by many third-country students. From abroad, European higher education is seen as confusing and fragmented, comprising many different national systems and languages of tuition. The lack of coherent information about opportunities for studying in Europe reinforces this impression.

At the same time, Europe is rated highly in terms of the quality of education on offer, even if the US scores better in this respect; Europe also comes out ahead of the US for culture, safety, and accessibility and affordability of education.

The current Erasmus Mundus programme provides a response to the challenges of internationalisation faced by European higher education. Enhancing the attractiveness and visibility of European higher education worldwide and promoting mobility between Europe and third countries can contribute to the broader need to adapt education systems to the demands of the knowledge society and to the process of modernising higher education as addressed in the Commission's May 2006 Communication mentioned above.

The present Erasmus Mundus programme has led European HEIs to start combining their individual strengths and educational diversity to try to attract the best

¹ Statistics refer to the 27 EU Member States, Iceland, Liechtenstein, Norway, Switzerland and Turkey.

internationally mobile students to world-class European programmes. Simultaneously, under its External Cooperation Window, Erasmus Mundus also tries to strengthen HEIs in certain regions of the world by providing a stimulus to their international co-operation capacity and by boosting mobility between Europe and these regions.

The impact assessment found that discontinuing the programme (i.e. doing nothing) could have serious implications in terms of the quality of students and academics attracted to Europe from third countries, the accessibility and visibility of European higher education in the world, and the fostering of intercultural dialogue and understanding.

- **Existing provisions in the area of the proposal**

The current Erasmus Mundus programme (2004-2008) was adopted by the European Parliament and the Council on 5 December 2003 (Decision No. 2317/2003/EC). Its External Cooperation Window is based on various Council regulations, the revised Cotonou Agreement and the Internal Agreement for the period 2008 to 2013, which are the funding instruments in the field of external co-operation with specific world regions.

It is proposed that the second phase of the Erasmus Mundus programme (2009-2013) would continue the activities of the first Erasmus Mundus programme, incorporate its External Cooperation Window more directly, extend its scope to all levels of higher education, improve funding opportunities for European students and offer enhanced possibilities for co-operation with HEIs located in third countries.

- **Consistency with the other policies and objectives of the Union**

Given the central role of higher education in social, cultural and economic policies, there are many connections between this programme proposal and other Community policies. Due account has therefore been taken of related Community programmes and objectives, such as the Lifelong Learning Programme, the Marie Curie programme, the initiative to create a European Institute of Technology, the Tempus programme, the Atlantis programme, the higher education agreement with Canada, as well as other external co-operation programmes such as Alban, Alfa, Edulink or Asia-Link.

There is continuity between the current and the future phase of Erasmus Mundus. The innovative and wider coverage gives the future Erasmus Mundus programme the architecture of a global programme linking internal and external EU policies. It reinforces EU policy coherence, visibility and presence abroad. Close cooperation with the Commission Delegations in third countries is essential for the success and the visibility of these programmes as well as for the visibility of the external EU policies, in general.

The objectives of the future Erasmus Mundus programme appear to be consistent with and often highly complementary to those of existing initiatives in similar areas, creating strong synergies between the various programmes. Furthermore, the objectives of the proposed programme are consistent with the wider political aims of the Lisbon Strategy and the Bologna Process, as well as with recent Commission Communications in the field of higher education.

As recent surveys amongst Erasmus Mundus students coming from third countries have shown that there continue to exist problems as regards the issuing of visas to third-country students, the Commission will monitor very closely the implementation of Council Directive (EC) No 114/2004 on the conditions of admission of third-country nationals for the purpose of studies, pupil exchange, unremunerated training or voluntary service.

2) CONSULTATION OF INTERESTED PARTIES AND IMPACT ASSESSMENT

- **Consultation of interested parties**

Consultation methods, main sectors targeted and general profile of respondents

The Commission consulted the Erasmus Mundus programme participants and relevant stakeholders (HEIs, organisations active in the field of higher education, students, academics, Erasmus Mundus national information and contact points, national authorities) on the future of the programme by the following means: a seminar of European and third-country Erasmus Mundus students in June 2006; an informal reflection meeting of the Erasmus Mundus programme committee (national authorities) in November 2006; a conference on "attractiveness" bringing together a wide range of programme participants from Europe and third countries in November 2006; a conference of Erasmus Mundus Masters Courses (European HEIs) in December 2006; and a meeting of Erasmus Mundus national information and contact points in December 2006.

Summary of responses and how they have been taken into account

The feedback provided by the stakeholders was overwhelmingly positive. The main messages can be summarised as follows: continue high-quality integrated masters programmes and full-study scholarships for third-country students, thus keeping the programme focus on promoting excellence in higher education; provide grants for European students to participate in these programmes, thereby ensuring the credibility of such programmes; extend the programme to the third cycle (doctorate); establish collaborative partnerships with third-country HEIs.

These responses have been taken into account in the drafting of the future Erasmus Mundus programme.

An open consultation was conducted over the internet from 05/02/2007 to 09/03/2007. The Commission received 417 response(s). The results are available at <http://ec.europa.eu/erasmus-mundus> as of June 2007.

- **Collection and use of expertise**

There was no need for external expertise.

- **Impact assessment**

The impact assessment report, based on expertise provided to the Commission by external consultants between January and April 2007, considered three options:

Option 1: Continuing the Erasmus Mundus programme and the External Cooperation Window in their current form. This option would continue to promote internationalisation, excellence and the identity of European higher education as they are currently. The "core" programme would continue to focus on attracting the best international students and academics to world-class integrated masters programmes in Europe. The External Cooperation Window would remain outside the "core" programme. This would have the advantage of continuity and of maintaining the focus on a limited number of precisely defined activities. However, it would ignore lessons learned from the current programme and feedback received from stakeholders, as well as missing the opportunity of integrating two strongly-related activities into one coherent programme.

Option 2: Modifying and extending the Erasmus Mundus programme. This option would widen the scope of the current Erasmus Mundus programme. World-class integrated masters programmes in Europe and scholarships for the best international students and academics would stay as one strand of the programme, but would be extended to incorporate the doctoral level and scholarships for European students. Another strand, the External Cooperation Window, widening the scope of the current programme to all other levels of higher education (bachelor, doctoral and post-doctoral) and to other forms of co-operation with third-country HEIs, including increased mobility flows between Europe and third countries, would be integrated into the programme. This would have the advantage of taking into account lessons learned and feedback received from stakeholders, as well as making Community action in the field of higher education relating to third countries more coherent and understandable. However, the programme would risk losing focus through the development of a programme that was too large and disparate.

Option 3: Discontinuing the Erasmus Mundus programme. The issues of internationalisation, excellence and visibility of European higher education would no longer be addressed through a specific Community programme, but through national initiatives and other existing Community programmes or actions. This option would have hardly any advantages, as the impetus created by the current programme, and a key stimulus for co-operation between European and third-country HEIs, would be lost.

The impact assessment report proposed that the future Erasmus Mundus programme be based on Option 2.

The Commission carried out an impact assessment; the report on that assessment is accessible at <http://ec.europa.eu/erasmus-mundus> as of June 2007.

3) LEGAL ELEMENTS OF THE PROPOSAL

- **Summary of the proposed action**

Action 1 (joint programmes including scholarships) provides support for high-quality joint master and doctoral programmes offered by a group of European and possibly third-country higher education institutions. It also provides full-study scholarships to the most talented European and third-country students to follow these joint programmes, and short-term scholarships to European and third-country academics of outstanding quality to carry out research or teaching assignments as part of the joint programmes. This Action will foster co-operation between higher education institutions and academic staff in Europe and third countries with a view to creating poles of excellence and providing highly trained human resources.

Action 2 (partnerships with third-country higher education institutions including scholarships) provides support for broad co-operative partnerships between European and third-country higher education institutions as a basis for structural co-operation in order to facilitate transfer of know-how to third-country institutions and for short- or long-term exchange of students and academics at all levels of higher education with a view to developing human resources and the international co-operation capacity of higher education institutions in third countries in line with the EU external policy with the countries concerned. It is an external cooperation action benefiting all partners involved and avoiding brain drain. It is thus fully in line with EU external policy towards the partner countries concerned with the objective of promoting their sustainable development.

Action 3 (enhancing the attractiveness of European higher education) provides support to transnational initiatives, studies, projects, events and other activities aiming at enhancing the attractiveness, accessibility, profile and visibility of European higher education in the world.

- **Legal basis**

The Erasmus Mundus programme will be based on Article 149 of the Treaty. It will take the form of a Decision of the European Parliament and the Council, with reference to the various Council regulations which constitute the Community's financing instruments in the field of external co-operation with specific world regions.

- **Subsidiarity principle**

The subsidiarity principle applies insofar as the proposal does not fall under the exclusive competence of the Community.

The objectives of the proposal cannot be sufficiently achieved by the Member States for the following reason(s).

There are marked differences in the approach of European countries towards the stimulation of mobility from third-country students. Some EU Member States have established programmes for mobility, whereas others are less active in this area. The objectives of existing national programmes vary and are not fully consistent or integrated. Furthermore, national schemes do not contribute to strengthening the profile

of a European higher education area that goes beyond the sum of its individual components.

Individual initiatives by single HEIs or Member States, though highly beneficial in themselves and complementary to any Community action, would often remain at bilateral level and would not have the same Europe-wide effect as a European co-operation instrument. The visibility of European higher education in the global context would continue to be confined to a small number of Member States and the advantages of Europe as a whole as a study destination would remain unadvertised.

Community action will better achieve the objectives of the proposal for the following reason(s).

The nature of the challenge that Europe is facing in this area means that co-ordinated action at European level is likely to be more effective than action at national, regional and local level, as it allows for identification of excellence, a pooling of resources in an international partnership, greater geographical coverage and mobility that encompasses more than one European country.

The proposal stimulates European and international co-operation between HEIs, encourages international mobility of students and academics and tries to create a profile and brand image of European higher education in the world. By the very nature of the activities proposed, the Community is better placed to achieve these aims than Member States acting at national level.

The key qualitative indicator for determining where greater co-operation at European level could improve the current situation is that Europe should become perceived as the most attractive study destination for internationally mobile students and researchers.

The proposal therefore complies with the subsidiarity principle.

- **Proportionality principle**

The proposal complies with the proportionality principle for the following reason(s).

This proposal conforms to the principle of proportionality because it can be implemented within the higher education framework existing in the Member States. It encourages new approaches which - as the interim evaluation of the current programme has shown - are considered feasible by HEIs.

The programme will use lump sums and unit costs as much as possible as the basis for calculating grant awards in order to minimise the administrative burden for beneficiaries.

- **Choice of instruments**

A Community action programme is the only possible legal instrument for stimulating co-operation in higher education. Article 149, on which the programme is based, would not allow for alternative instruments.

4) BUDGETARY IMPLICATION

The overall budget for the entire programming period (2009-2013) for Action 1 and Action 3 (joint masters and doctoral programmes, including scholarships, and attractiveness projects) amounts to 493.69 million euros. Action 2 (co-operative partnerships with HEIs in specific third countries, including mobility) is funded through external co-operation instruments according to the rules and procedures provided by these instruments.

The Commission will endeavour to devote for the entire programming period (2009-2013) a global indicative amount of up to 460 million euros for Action 2 of Erasmus Mundus II. The indicative contributions from the different external instruments and the European Development Fund are as follows:

- ENPI: 140 million euros
- DCI: 240 million euros
- ICI: 20 million euros
- IPA: 30 million euros
- 10th EDF: 30 million euros

Detailed programming and yearly allocations for each envelope contributing to the global indicative amount of 460 million euros will be established at a later stage according to the rules and procedures of each instrument and the European Development Fund, but not later than 1st July 2008 for the period 2009-2010 and 1st July 2010 for the period 2011-2013.

5) ADDITIONAL INFORMATION

- **European Economic Area**

The proposed act concerns an EEA matter and should therefore extend to the European Economic Area.

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establishing an action programme for the enhancement of quality in higher education and the promotion of intercultural understanding through co-operation with third countries (Erasmus Mundus) (2009-2013)

THE EUROPEAN PARLIAMENT AND THE COUNCIL OF THE EUROPEAN UNION,

Having regard to the Treaty establishing the European Community, and in particular Article 149 (4) thereof,

Having regard to the proposal from the Commission²,

Having regard to the opinion of the European Economic and Social Committee³,

Having regard to the opinion of the Committee of the Regions⁴,

Acting in accordance with the procedure laid down in Article 251 of the Treaty,

Whereas:

- (1) Decision No 2317/2003/EC of the European Parliament and of the Council⁵ established a programme for the enhancement of quality in higher education and the promotion of intercultural understanding through co-operation with third countries (Erasmus Mundus) (2004-2008).
- (2) Regulation (EC) No 1085/2006 of the Council⁶ established an Instrument for Pre-Accession, Regulation (EC) No 1638/2006 of the European Parliament and of the Council⁷ established a European Neighbourhood and Partnership Instrument, Regulation (EC) No 1905/2006 of the European Parliament and of the Council⁸ established a financing instrument for development cooperation, Regulation (EC) No 1934/2006 of the Council⁹ established a financing instrument for cooperation with industrialised and other high-income countries and territories, the Partnership Agreement between the members of the African, Caribbean and Pacific Group of States and the European Community and its Member States, signed in Cotonou on 23

² OJ C , , p.

³ OJ C , , p.

⁴ OJ C , , p.

⁵ OJ L 345, 31.12.2003, p.1

⁶ OJ L 210, 31.7.2006, p.82

⁷ OJ L 310, 9.11.2006, p.1

⁸ OJ L 378, 27.12.2006, p.41

⁹ OJ L 405, 30.12.2006, p.41

June 2000, as amended by the Agreement signed in Luxembourg on 25 June 2005 (Council Decision 2005/599/EC)¹⁰, and the Internal Agreement establishing the financing of Community aid under the multiannual financial framework for the period 2008 to 2013 in accordance with the ACP-EC Partnership Agreement (Decision No 1/2006 of the ACP-EC Council of Ministers, 2006/608/EC)¹¹, govern the European Development Fund.

- (3) The Bologna Declaration, signed by the Ministers for Education of 29 European countries on 19 June 1999, established an intergovernmental process aimed at creating a 'European Higher Education Area' by 2010, a process which is actively supported at Community level. In their meeting in London on 17-18 May 2007, the 45 Ministers of Higher Education of the countries participating in the Bologna process adopted the strategy "The European Higher Education Area in a Global Setting" and, in this context, identified as priorities for 2009 improved information about the European Higher Education Area and improved recognition of higher education qualifications with other parts of the world.
- (4) The special meeting of the European Council in Lisbon on 23-24 March 2000 set a strategic goal for the European Union to become the most competitive and dynamic knowledge-based economy in the world and invited the Education Council to undertake a general reflection on the concrete future objectives of education systems, focusing on common concerns and priorities while respecting national diversity. On 12 February 2001 the Council adopted a report on the concrete future objectives of education and training systems. On 14 June 2002 it subsequently adopted a detailed work programme on the follow-up of these objectives, requiring support at Community level. The meeting of the European Council in Barcelona on 15-16 March 2002 set the objective of making the European's Union education and training systems a world quality reference by 2010.
- (5) The Commission Communications "Mobilising the Brainpower of Europe"¹² and "Delivering on the Modernisation Agenda for Universities"¹³, and the proposal for a Regulation establishing the European Institute of Technology¹⁴ underline the need for European higher education institutions to overcome their fragmentation and join forces in a quest for increased quality in teaching and research as well as for a better correspondence with the changing needs of the labour market. The European Council of June 2006 endorsed the need for modernising European higher education.
- (6) The interim evaluation report of the existing Erasmus Mundus programme and the open public consultation on the future of the programme underlined the relevance of the objectives and actions of the current programme and expressed a wish for continuity, with certain adaptations such as extending the programme to the doctoral level, integrating higher education institutions located in third countries and their needs more strongly in the programme and providing more funds to European participants in the programme.

¹⁰ OJ L 209, 11.8.2005, p.26

¹¹ OJ L 247, 9.9.2006, p.22

¹² COM(2005) 152 final

¹³ COM(2006) 208 final

¹⁴ COM(2006) 604 final/2

- (7) Enhancing the quality of European higher education, promoting understanding between peoples as well as contributing to the sustainable development of third countries in the field of higher education avoiding brain-drain whilst favouring vulnerable groups are the core objectives of a higher education cooperation programme aimed at third countries. The most effective means to achieve these aims in a programme of excellence are highly integrated study programmes at postgraduate level, collaborative partnerships with third countries, scholarships for the most talented students and projects to enhance the worldwide attractiveness of European higher education.
- (8) There is a need to step up the fight against exclusion in all its forms, including racism and xenophobia, and to step up Community efforts to promote dialogue and understanding between cultures world-wide, bearing in mind the social dimension of higher education as well as the ideals of democracy and respect for human rights, especially as mobility fosters the exchange with new cultural and social environments and facilitates understanding thereof, and in so doing to ensure that no group of citizens or of third-country nationals is excluded or disadvantaged as mentioned in Article 21(1) of the Charter of Fundamental Rights of the European Union.
- (9) Promoting the teaching and learning of languages and linguistic diversity should be a priority of Community action in the field of higher education. The teaching and learning of languages is of special relevance in relation to third countries.
- (10) The Commission Communication "Europe in the world – some practical proposals for greater coherence, effectiveness and visibility"¹⁵ addresses the external challenges which Europe faces, including how to use available internal and external policies more coherently and effectively. Moreover, within the context of the Commission Communication "The Western Balkans on the road to the EU: consolidating stability and raising prosperity"¹⁶, the Commission has recommended expanding mobility opportunities for academics and students at all levels of higher education from that region.
- (11) In the period 2004-2008, country-specific scholarships funded from the Commission's external cooperation instruments complemented the Erasmus Mundus scholarships in order to extend the number of beneficiary students coming from specific third countries, such as China, India, the Western Balkan countries or the ACP countries, to study in Europe. Given the positive experience with this approach, similar opportunities could be envisaged in the future in accordance with the political priorities, rules and procedures of the external co-operation instruments in question.
- (12) In all its activities, the Community must aim to eliminate inequalities, and promote equality, between men and women, as provided for in Article 3(2) of the Treaty.
- (13) There is a need to widen access for those from disadvantaged groups and to address actively the special learning needs of people with disabilities in the implementation of all parts of the programme, including through the use of higher grants to reflect the additional costs of disabled participants.

¹⁵ COM(2006) 278 final

¹⁶ COM(2006) 27 final

- (14) Council Regulation (EC, Euratom) No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities as amended by Council Regulation (EC, Euratom) No 1995/2006¹⁷ and Commission Regulation (EC, Euratom) No 2342/2002 as amended by Commission Regulation No 478/2007 laying down detailed rules for the implementation of Council Regulation 1605/2002 as amended by Council Regulation (EC, Euratom) No 1995/2006¹⁸, which safeguard the Community's financial interests, have to be applied taking into account the principles of simplicity and consistency in the choice of budgetary instruments and the required proportionality between the amount of resources and the administrative burden related to their use.
- (15) Since the objectives of the proposed action cannot be sufficiently achieved by the Member States because of the need for multilateral partnerships, multilateral mobility and exchanges of information between the Community and third countries, and can therefore, by reason of the nature of the actions and measures necessary, be better achieved at Community level, the Community may adopt measures, in accordance with the principle of subsidiarity as set out in Article 5 of the Treaty. In accordance with the principle of proportionality, as set out in that Article, this Decision does not go beyond what is necessary in order to achieve those objectives.
- (16) The measures necessary for the implementation of actions referred to in Article 4(1)(a) and Article 4(1)(c) of this Decision should be adopted in accordance with Council Decision 1999/468/EC laying down the procedures for the exercise of implementing powers conferred on the Commission¹⁹. The measures necessary for the implementation of the action referred to in Article 4(1)(b) of this Decision should be adopted in accordance with Regulation (EC) No 1085/2006 of the Council establishing an Instrument for Pre-Accession, Regulation (EC) No 1638/2006 of the European Parliament and of the Council establishing a European Neighbourhood and Partnership Instrument, Regulation (EC) No 1905/2006 of the European Parliament and of the Council laying down general provisions establishing a financing instrument for development cooperation, Regulation (EC) No 1934/2006 of the Council establishing a financing instrument for cooperation with industrialised and other high-income countries and territories, the Partnership Agreement between the members of the African, Caribbean and Pacific Group of States and the European Community and its Member States, signed in Cotonou on 23 June 2000, as amended by the Agreement signed in Luxembourg on 25 June 2005 (Council Decision 2005/599/EC), and its Internal Agreement between the representatives of the Governments of the Member States, meeting with the Council, on the financing of Community aid under the multiannual financial framework for the period 2008 to 2013 in accordance with the ACP-EC Partnership Agreement and on the allocation of financial assistance for the Overseas Countries and Territories to which Part Four of the EC Treaty applies (Decision No 1/2006 of the ACP-EC Council of Ministers, 2006/608/EC).

¹⁷ OJ L 390, 30.12.2006, p.1

¹⁸ OJ L 111, 28.4.2007, p.13

¹⁹ OJ L 184, 17.7.1999, p.23

HAVE DECIDED AS FOLLOWS:

Article 1

Establishment of the programme

1. This Decision establishes a programme — ‘Erasmus Mundus’ (hereinafter ‘the programme’) — for the enhancement of quality in European higher education and the promotion of intercultural understanding through cooperation with third countries as well as for the development of third countries in the field of higher education.
2. The programme shall be implemented over a period starting on 1 January 2009 and ending on 31 December 2013. However, preparatory measures, including decisions by the Commission in accordance with Article 7, may be implemented as from the entry into force of this Decision.
3. The programme shall support and supplement action taken by and in the Member States while fully respecting their responsibility for the content of education and the organisation of education and training systems, and their cultural and linguistic diversity.
4. The development of human resources in specific third countries, and more particularly the action of the programme referred to in Article 4(1)(b), shall be implemented in accordance with Regulations (EC) No 1085/2006, 1638/2006, 1905/2006 and 1934/2006 and Decisions (EC) No 599/2005 and 608/2006.

Article 2

Definitions

For the purpose of this Decision:

1. “higher education institution” means any institution which according to national legislation or practice offers qualifications or degrees at that level, whatever such establishments may be called;
2. “bachelor student” (student in first cycle) means a person studying at a higher education institution in order to obtain a first higher education degree;
3. “master student” (student in second cycle) means a person studying at a higher education institution who has already obtained a first higher education degree;
4. “doctoral candidate” (candidate in third cycle) means an early-stage researcher in the first four years (full-time equivalent) of his/her research career, starting at the date of obtaining the degree which would formally entitle him/her to embark on a doctorate;
5. “post-doctoral researcher” means an experienced researcher who is in possession of a doctoral degree or who has at least four years of full-time equivalent research experience, including the period of research training, after obtaining the degree which formally allowed him/her to embark on a doctorate;

6. “academic” means a person with outstanding academic and/or professional experience who lectures or conducts research;
7. “higher education staff” means persons who, through their duties, are involved directly in the educational process related to higher education;
8. "third country" means a country which is not a Member State of the European Union and which does not participate in the programme according to Article 9. “Third-country” referring to an individual means a person who is not a national or a resident of any of the Member States or the countries participating in the programme according to Article 9 and who has not carried out his or her main activity (studies, work, etc.) for more than a total of 12 months over the last five years in any of the Member States or the countries participating in the programme according to Article 9. “Third-country” referring to an institution means an institution which is not located in any of the Member States or the countries participating in the programme according to Article 9. The countries participating in the Lifelong Learning Programme²⁰ are not considered as third countries for the implementation of the action of the programme referred to in Article 4(1)(b);
9. "European country" means a country which is a Member State of the European Union or which participates in the programme according to Article 9. “European” referring to an individual means a person who is a national or a resident of any of the Member States or the countries participating in the programme according to Article 9 or who has carried out his or her main activity (studies, work, etc.) for more than a total of 12 months over the last five years in any of the Member States or the countries participating in the programme according to Article 9. “European” referring to an institution means an institution which is located in any of the Member States or the countries participating in the programme according to Article 9;
10. “bachelor studies” (first cycle) means programmes of higher education study that last a minimum of three years and lead to a first degree;
11. “master studies” (second cycle) means programmes of higher education study that follow a first degree lasting a minimum of three years and lead to a second or further degree;
12. “doctoral studies” (third cycle) means research-related programmes of higher education study that follow a higher education degree lasting a minimum of four or five years and lead to a doctoral degree;
13. “post-doctoral studies” means higher education study or research that follows a higher education degree lasting a minimum of eight years;
14. “mobility” means moving physically to another country, in order to undertake study, work experience, research, other learning or teaching or research activity or related administrative activity, supported as appropriate by preparation in the host language;

²⁰ OJ L 327, 24.11.2006, p.45

15. “double or multiple degree” means two or more national diplomas issued by two or more higher education institutions and recognised officially in the countries where the degree-awarding institutions are located;
16. “joint degree” means a single diploma issued by at least two of the higher education institutions offering an integrated programme and recognised officially in the countries where the degree-awarding institutions are located;
17. “enterprise” means all undertakings engaged in economic activity in the public and private sector, whatever their size, legal status or the economic sector in which they operate, including the social economy.

Article 3

Objectives of the programme

1. The programme's overall aim is to enhance the quality of European higher education and to promote dialogue and understanding between peoples and cultures through cooperation with third countries as well as to promote EU external policy objectives and the sustainable development of third countries in the field of higher education.
2. The programme's specific objectives are:
 - a) to foster structured cooperation between higher education institutions and academic staff in Europe and third countries with a view to creating centres of excellence and providing highly trained human resources;
 - b) to contribute to the mutual enrichment of societies by developing a pool of well-qualified, open-minded and internationally experienced women/men through promoting mobility for the most talented students and academics from third countries to obtain qualifications and/or experience in the European Union and for the most talented European students and academics towards third countries;
 - c) to contribute towards the development of human resources and the international cooperation capacity of higher education institutions in third countries through increased mobility streams between the European Union and third countries;
 - d) to improve accessibility and enhance the profile and visibility of European higher education in the world as well as its attractiveness for third-country nationals.
3. The Commission shall ensure that no group of EU citizens or third-country nationals is excluded or disadvantaged.

Article 4

Programme actions

1. The objectives of the programme as set out in Article 3 shall be pursued by means of the following actions:
 - (a) Erasmus Mundus joint masters programmes and joint doctoral programmes of outstanding academic quality, including a scholarship scheme;
 - (b) partnerships between European and third-country higher education institutions as a basis for structural co-operation, exchange and mobility at all levels of higher education;
 - (c) measures enhancing the attractiveness of Europe as an educational destination.
2. These actions shall be implemented using the procedures described in the Annex and, as for the action of the programme referred to in Article 4(1)(b), the procedures laid down in the legal instruments mentioned in Article 1(4), and through the following types of approaches, which may be combined where appropriate:
 - (a) support for the development of joint educational programmes and cooperation networks facilitating the exchange of experience and good practice;
 - (b) enhanced support for mobility, between the Community and third countries, of people in the field of higher education;
 - (c) promotion of language skills, preferably providing students with the possibility of learning at least two of the languages spoken in the countries in which the higher education institutions are situated, and promotion of the understanding of different cultures;
 - (d) support for pilot projects based on partnerships with an external dimension designed to develop innovation and quality in higher education;
 - (e) support for the analysis and follow-up of trends in, and evolution of, higher education in an international perspective.
3. The programme provides for technical support measures including studies, meetings of experts as well as information and publications directly linked to the achievement of the objectives of the programme.
4. The actions referred to in this Article may be implemented by means of calls for proposals, calls for tenders, or directly by the Commission.

Article 5

Access to the programme

Under the conditions and arrangements for implementation specified in the Annex and bearing in mind the definitions in Article 2, the programme is aimed in particular at:

- a) higher education institutions;
- b) students in higher education, at all levels;
- c) academics or professionals who lecture or conduct research;
- d) staff directly involved in higher education;
- e) other public or private bodies active in the field of higher education;
- f) enterprises, chambers of commerce and industry;
- g) research centres.

Article 6

Tasks of the Commission and of the Member States

1. The Commission shall:
 - (a) ensure the effective and efficient implementation of the Community actions provided for by the programme in conformity with the Annex and, as regards the action of the programme referred to in Article 4(1)(b), with the legal instruments mentioned in Article 1(4);
 - (b) take account of bilateral cooperation with third countries undertaken by Member States;
 - (c) seek synergies and, where appropriate, develop joint actions with other Community programmes and actions in the field of higher education and research.
2. The Member States shall:
 - (a) take the necessary steps to ensure the efficient running of the programme at Member State level involving all the parties concerned in higher education in accordance with national practice, including endeavours to adopt such measures as may be deemed appropriate to remove legal and administrative barriers;
 - (b) designate appropriate structures to cooperate closely with the Commission;
 - (c) encourage potential synergies with other Community programmes and possible similar national initiatives taken at Member State level.
3. The Commission, in cooperation with the Member States, shall ensure:
 - (a) appropriate information, publicity and follow-up with regard to actions supported by the programme;
 - (b) the dissemination of the results of the actions undertaken within the framework of the programme.

Article 7

Implementing measures

1. All measures necessary for the implementation of the action referred to in Article 4(1)(b) are not governed by this Decision and are following the procedures of the legal instruments referred to in Article 1(4).
2. The following measures necessary for the implementation of the other actions of this Decision shall be adopted by the Commission in accordance with the management procedure referred to in Article 8(2):
 - (a) the annual plan of work, including priorities;
 - (b) the annual budget and the breakdown of funds among the different actions of the programme and indicative grant amounts;
 - (c) the general guidelines for implementing the programme;
 - (d) the selection criteria and procedures, including the composition and the internal rules of procedure of the selection board;
 - (e) the arrangements for monitoring and evaluating the programme and for the dissemination and transfer of results.
3. All other measures necessary for the implementation of this Decision, with the exception of selection decisions, shall be adopted in accordance with the advisory procedure referred to in Article 8(3).

Article 8

Committee procedure

1. The Commission shall be assisted by a Committee.
2. Where reference is made to this paragraph, Articles 4 and 7 of Decision 1999/468/EC shall apply, having regard to the provisions of Article 8 thereof.

The period laid down in Article 4(3) of Decision 1999/468/EC shall be set at two months.
3. Where reference is made to this paragraph, Articles 3 and 7 of Decision 1999/468/EC shall apply, having regard to the provisions of Article 8 thereof.
4. The Committee shall adopt its Rules of Procedure.

Article 9

Participation of other countries in the programme on the same footing as Member States

The programme shall be open to the participation of:

- a) EFTA countries which are members of the EEA, in accordance with the conditions laid down in the EEA Agreement;
- b) the candidate countries which have a pre-accession strategy, in accordance with the general principles and general terms and conditions laid down in the framework agreements concluded with these countries for their participation in Community programmes;
- c) the countries of the Western Balkans, in accordance with the general principles and general terms and conditions laid down in the framework agreements concluded with these countries for their participation in Community programmes;
- d) The Swiss Confederation, provided that a bilateral agreement foreseeing this participation is concluded with that country.

Article 10

Horizontal issues

In implementing the programme, due regard shall be paid to ensuring that it contributes fully to furthering the horizontal policies of the Community, in particular by:

- a) enhancing the knowledge base of European economy and contributing to strengthening the global competitiveness of the European Union;
- b) promoting an awareness of the importance of cultural and linguistic diversity within Europe, as well as of the need to combat racism and xenophobia;
- c) making provision for students with special needs, and in particular by helping to promote their integration into mainstream higher education;
- d) promoting equality between men and women and contributing to combating all forms of discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation.

Article 11

Consistency and complementarity with other policies

1. The Commission shall, in cooperation with the Member States, ensure overall consistency and complementarity with other relevant Community policies, instruments and actions, in particular with the Lifelong Learning Programme, the Seventh

Framework Programme for Research, with external cooperation programmes and with the European Fund for the Integration of third-country nationals.

2. The Commission shall keep the Committee referred to in Article 8(1) regularly informed about Community initiatives taken in relevant fields, ensure efficient linkage and, where appropriate, joint actions between the programme and the programmes and actions in the area of higher education undertaken within the framework of the Community's cooperation with third countries, including bilateral agreements, and the competent international organisations.

Article 12

Funding

1. The financial framework for the implementation of the actions of the programme referred to in Article 4(1)(a), 4(1)(c) and 4(3) and as set out in the Annex to the decision – Action 1, Action 3 and related technical support measures - for the period specified in Article 1(2) is hereby set at EUR 493.69 million.
2. The financial framework for the implementation of the actions of the programme referred to in Article 4(1)(b) and Article 4(3) and as set out in the Annex to the decision – Action 2 and related technical support measures - for the period specified in Article 1(2) is set in accordance with the rules and procedures laid down in the external cooperation instruments referred to in Article 1(4).
3. The annual appropriations shall be authorised by the budgetary authority within the limits of the financial perspective.

Article 13

Monitoring and evaluation

1. The Commission shall regularly monitor the programme in cooperation with the Member States. The results of the process of monitoring and evaluation of the programme and of the previous programme shall be utilised when implementing the programme. This monitoring shall include the reports referred to in paragraph 3 and specific activities.
2. The programme shall be evaluated regularly by the Commission having regard to the objectives referred to in Article 3, the impact of the programme as a whole and the complementarity between action under the programme and that pursued under other relevant Community policies, instruments and actions.
3. The Commission shall submit to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions:
 - a) an interim evaluation report on the results achieved and on the qualitative and quantitative aspects of the implementation of the programme by 31 March 2012;

- b) a communication on the continuation of the programme by 30 June 2012;
- c) an ex post evaluation report by 31 December 2015.

Article 14

Transitional provision

1. Actions which are initiated on or before 31 December 2008 on the basis of Decision 2317/2003/EC shall be administered in conformity with the provisions of that Decision, with the exception that the committee established by that Decision shall be replaced by the committee established by Article 8 of the present Decision.
2. Actions which are initiated on or before 31 December 2008 on the basis of the procedures laid down in the legal instruments mentioned in Article 1(4) shall be administered in conformity with the provisions of those instruments.

Article 15

Entry into force

This Decision shall enter into force on the day following its publication in the *Official Journal of the European Union*.

Done at Brussels,

For the European Parliament
The President

For the Council
The President

ANNEX

COMMUNITY ACTIONS, SELECTION PROCEDURES AND FINANCIAL PROVISIONS

ACTION 1: ERASMUS MUNDUS JOINT PROGRAMMES INCLUDING SCHOLARSHIPS

ACTION 2: ERASMUS MUNDUS PARTNERSHIPS WITH THIRD-COUNTRY HIGHER EDUCATION INSTITUTIONS

ACTION 3: ENHANCING ATTRACTIVENESS OF EUROPEAN HIGHER EDUCATION

TECHNICAL SUPPORT MEASURES

SELECTION PROCEDURES

FINANCIAL PROVISIONS

ACTION 1: ERASMUS MUNDUS JOINT PROGRAMMES INCLUDING SCHOLARSHIPS

A. ERASMUS MUNDUS MASTERS PROGRAMMES

1. The Community will select master programmes of outstanding academic quality which, for the purposes of the programme, will be called 'Erasmus Mundus masters programmes'.
2. For the purpose of the programme, Erasmus Mundus masters programmes:
 - a) shall involve higher education institutions from a minimum of three different European countries;
 - b) may involve higher education institutions from third countries;
 - c) shall implement a study programme which involves a period of study in at least two of the three institutions under point (a). In addition, if masters programmes involve one or more institutions from third countries under point (b), mobility for European students shall also involve a period of study in one of these third-country institutions;
 - d) where appropriate, shall encourage placements as part of the study programme;
 - e) shall have built-in mechanisms for the recognition of periods of study undertaken in partner institutions based on, or compatible with, the European credit transfer and accumulation system;
 - f) shall result in the awarding of joint, double or multiple degrees, recognised or accredited by the European countries, from the participating institutions. Joint degrees will be given priority;
 - g) shall establish stringent self-evaluation procedures and agree to be peer reviewed by external experts in order to ensure the continuing high quality of the masters programme;

- h) shall reserve a minimum of places for, and host, European and third-country students who have been granted financial support under the programme;
 - i) shall establish transparent joint conditions for admissions which pay due regard, inter alia, to gender issues and equity issues;
 - j) shall establish a joint tuition fee regardless of the actual place of study of the students within the masters programme;
 - k) shall agree to comply with the rules applicable to the selection procedure of grantees (students and academics);
 - l) shall put in place appropriate arrangements to facilitate access for, and hosting of, European and third-country students (information facilities, accommodation, assistance with visas, etc.);
 - m) without prejudice to the language of instruction, shall provide for the use of at least two European languages spoken in the Member States where the higher education institutions involved in the Erasmus Mundus masters programme are situated and, as appropriate, for language preparation and assistance for students, in particular by means of courses organised by the institutions in question.
3. Erasmus Mundus masters programmes will be selected for a five-year period, subject to an annual renewal procedure based on progress reporting.
 4. The Erasmus Mundus masters programmes selected under the previous Erasmus Mundus programme will continue within the framework of this action until the end of the period for which they have been selected, subject to an annual renewal procedure based on progress reporting.

B. ERASMUS MUNDUS DOCTORAL PROGRAMME

1. The Community will select doctoral programmes of outstanding academic quality which, for the purposes of the programme, will be called 'Erasmus Mundus doctoral programmes'.
2. For the purpose of the programme, Erasmus Mundus doctoral programmes:
 - a) shall involve higher education institutions from a minimum of three different European countries and other relevant partners to ensure innovation and employability;
 - b) may involve higher education institutions or other relevant partners from third countries;
 - c) shall implement a doctoral programme which involves a period of study and research in at least two of the three institutions under point (a). In addition, if doctoral programmes involve one or more institutions from third countries under point (b), mobility for European doctoral candidates shall also involve a period of study and research in one of these third-country institutions;

- d) where appropriate, shall encourage placements as part of the doctoral programme;
 - e) shall have built-in mechanisms for the recognition of periods of study and research undertaken in partner institutions based on, or compatible with, the European credit transfer and accumulation system;
 - f) shall result in the awarding of joint, double or multiple degrees, recognised or accredited by the European countries, from the participating institutions. Joint degrees will be given priority;
 - g) shall establish stringent self-evaluation procedures and agree to be peer reviewed by external experts in order to ensure the continuous high quality of the doctoral programme;
 - h) shall reserve a minimum of places for, and host, European and third-country doctoral candidates who have been granted financial support under the programme;
 - i) shall establish transparent joint conditions for admissions which pay due regard, inter alia, to gender issues and equity issues;
 - j) shall establish a joint tuition fee regardless of the actual place of study and research of the doctoral candidates within the doctoral programme;
 - k) shall agree to respect the rules applicable to the selection procedure of doctoral candidates;
 - l) shall put in place appropriate arrangements to facilitate access for, and hosting of, European and third-country doctoral candidates (information facilities, accommodation, assistance with visas, etc.);
 - m) shall guarantee the use of employment contracts for doctoral candidates receiving a scholarship if this is allowed by national legislation;
 - n) without prejudice to the language of instruction, shall provide for the use of at least two European languages spoken in the Member States where the higher education institutions involved in the Erasmus Mundus doctoral programme are situated and, as appropriate, for language preparation and assistance for doctoral candidates, in particular by means of courses organised by the institutions in question.
3. Erasmus Mundus doctoral programmes will be selected for a five-year period, subject to an annual renewal procedure based on progress reporting, which period could include a year's preparatory activities before the recruitment of doctoral candidates.

C. SCHOLARSHIPS

1. The Community may provide full-study scholarships to third-country and European master students and doctoral candidates as well as short-term scholarships for third-country and European academics.

- a) The Community may provide full-study scholarships to third-country master students and doctoral candidates who have been admitted, through a competitive process, to Erasmus Mundus masters programmes and Erasmus Mundus doctoral programmes. These scholarships are for study at the European institutions involved in an Erasmus Mundus masters programme or an Erasmus Mundus doctoral programme.
 - b) The Community may provide full-study scholarships to European master students and doctoral candidates who have been admitted, through a competitive process, to Erasmus Mundus masters programmes and Erasmus Mundus doctoral programmes. These scholarships are for study at the European institutions involved in an Erasmus Mundus masters programme or an Erasmus Mundus doctoral programme and, if these also involve one or more third-country institutions, for study at one of these.
 - c) The Community may provide short-term scholarships to third-country academics visiting the Erasmus Mundus masters programmes, with a view to carrying out teaching and research assignments and scholarly work in the European institutions participating in Erasmus Mundus masters programmes.
 - d) The Community may provide short-term scholarships to European academics visiting third-country institutions involved in Erasmus Mundus masters programmes, with a view to carrying out teaching and research assignments and scholarly work in the third-country institutions participating in Erasmus Mundus masters programmes.
2. Scholarships will be open to European and third-country master students and doctoral candidates as well as academics as defined in Article 2.
 3. Persons having received a scholarship for Erasmus Mundus masters programmes are also eligible for receiving a scholarship for Erasmus Mundus doctoral programmes.
 4. The Commission shall take steps to ensure that no person receives financial support for the same purpose under more than one Community programme. In particular, persons having received an Erasmus Mundus scholarship are not eligible to receive an Erasmus grant for the same Erasmus Mundus masters programme or doctoral programme under the Lifelong Learning Programme. Similarly, persons benefiting from a grant under the "People Specific Programme" (Marie Curie Actions) of the 7th Framework Programme for research, technological development and demonstration activities²¹ are not eligible to receive an Erasmus Mundus grant for the same period of study or research.

ACTION 2: ERASMUS MUNDUS PARTNERSHIPS WITH THIRD-COUNTRY HIGHER EDUCATION INSTITUTIONS INCLUDING SCHOLARSHIPS

1. The Community will select partnerships of high academic quality which, for the purposes of the programme, will be called 'Erasmus Mundus partnerships'. They pursue and are in line with the objectives of article 3.

²¹ OJ L 54, 22.2.2007, p.91

2. For the purpose of the programme, Erasmus Mundus partnerships shall:
 - a) involve a minimum of five higher education institutions from a minimum of three different European countries and a number of higher education institutions in specific third countries not participating in the Lifelong Learning Programme to be defined in the annual calls for proposals;
 - b) implement a partnership as a basis for transfer of know-how;
 - c) exchange students at all levels of higher education (from bachelor to post-doctoral), academics and higher education staff for mobility periods of variable length, including the possibility of placement periods. Mobility must take European nationals to third countries and third-country nationals to European countries. The scheme will also allow the hosting of third-country nationals who are not linked to the third-country institutions involved in the partnerships, as well as include specific provisions for vulnerable groups, as appropriate to the political and socio-economic context of the respective region/country;
 - d) have built-in mechanisms for the recognition of periods of study and research undertaken in partner institutions based on, or compatible with, the European credit transfer and accumulation system;
 - e) use mobility instruments developed under the Erasmus programme, such as the recognition of previous study periods, the learning agreement and the transcript of records;
 - f) establish transparent conditions for the award of mobility grants which pay due regard, inter alia, to gender issues and equity issues;
 - g) agree to respect the rules applicable to the procedure for the selection of grantees (students, academics and higher education staff);
 - h) put in place appropriate arrangements to facilitate access for, and hosting of, European and third-country students, academics and higher education staff (information facilities, accommodation, assistance with visas, etc.);
 - i) without prejudice to the language of instruction, provide for the use of the languages spoken in the countries where the higher education institutions involved in the Erasmus Mundus partnerships are situated and, as appropriate, for language preparation and assistance for scholarships grantees, in particular by means of courses organised by the institutions in question;
 - j) implement further partnership activities, such as double degrees, joint curriculum development, transfer of best practices, etc.
3. The Commission, after consultation of the competent authorities in the third countries concerned via its Delegations, shall define national and regional priorities according to the needs of the specific third country/ies concerned by the partnerships.
4. Erasmus Mundus partnerships will be selected for a three-year period, subject to an annual renewal procedure based on progress reporting.

5. Scholarships will be open to European and third-country students and academics as defined in Article 2.
6. In assigning the scholarships under this action, the Commission shall support socio-economic disadvantaged groups and populations in vulnerable situations.
7. The Commission shall take steps to ensure that no person receives financial support for the same purpose under more than one Community programme. In particular, persons having received an Erasmus Mundus scholarship are not eligible to receive an Erasmus grant for the same mobility period under the Lifelong Learning Programme. Similarly, persons benefiting from a grant under the "People Specific Programme" (Marie Curie Actions) of the 7th Framework Programme for research, technological development and demonstration activities are not eligible to receive an Erasmus Mundus grant for the same period of study or research.
8. The partnerships selected under the Erasmus Mundus External Cooperation Window (previous name of this action) will continue within the framework of that action until the end of the period for which they have been selected, subject to a lightweight annual renewal procedure based on progress reporting.

ACTION 3: ENHANCING THE ATTRACTIVENESS OF EUROPEAN HIGHER EDUCATION

1. Through this action, the Community may support activities aimed at enhancing the attractiveness, profile, image and visibility of, and accessibility to, European higher education. Activities shall contribute to the objectives of the programme and relate to the international dimension of all aspects of higher education, such as promotion, accessibility, quality assurance, credit recognition, recognition of European qualifications abroad and mutual recognition of qualifications with third countries, curriculum development, mobility, quality of services, etc. Activities may include the promotion of the programme and its outputs.
2. Eligible institutions may include public or private organisations active in the field of higher education domestically or at international level. Activities shall be conducted within projects involving organisations from a minimum of three different European countries and may involve organisations from third countries.
3. Activities can take various forms (conferences, seminars, workshops, studies, analyses, pilot projects, prizes, international networks, production of material for publication, development of ICT tools, etc.) and may take place anywhere in the world.
4. Activities shall seek to establish links between higher education and research and higher education and the private sector, and exploit potential synergies whenever possible.
5. The Community may support, as appropriate, the structures designated in accordance with Article 6(2)(b) in their efforts to promote the programme and disseminate its results nationally and worldwide.

6. The Community shall support an alumni association of all students (third-country and Europeans) graduating from Erasmus Mundus masters programmes and Erasmus Mundus doctoral programmes.

TECHNICAL SUPPORT MEASURES

The overall financial framework of the programme may also cover expenditure related to experts, an executive agency, existing competent bodies in Member States and, if necessary, to other forms of technical and administrative assistance to which the Commission may need to have recourse for the implementation of the programme. These may in particular include studies, meetings, information activities, publications, monitoring activities, control and audit activities, evaluation activities, expenditure on informatics networks for the exchange of information and any other expenditure directly necessary for the implementation of the programme and for the achievement of its objectives.

SELECTION PROCEDURES

The selection procedures should respect the following provisions:

- a) proposals under action 1 will be selected by the Commission assisted by a selection board presided over by a person whom it elects, composed of personalities of high standing from the academic world who are representative of the diversity of higher education in the European Union. The selection board shall ensure that Erasmus Mundus masters programmes and doctoral programmes correspond to the highest academic quality. The Commission shall organise a European-level assessment of all eligible proposals by independent academic experts prior to submitting the proposals to the selection board. Each Erasmus Mundus masters programme and doctoral programme will be allocated a specific number of scholarships which will be paid to the selected individuals by the body managing the masters programmes and doctoral programmes. The selection of master students, doctoral candidates and academics will be carried out by the institutions participating in the Erasmus Mundus masters programmes and doctoral programmes following consultation with the Commission;
- b) proposals under action 2 will be selected by the Commission according to the rules laid down in Regulations (EC) No 1085/2006, 1638/2006, 1905/2006 and 1934/2006 and Decisions (EC) No 599/2005 and 608/2006;
- c) proposals under action 3 will be selected by the Commission;
- d) selection procedures for Erasmus Mundus masters programmes and doctoral programmes shall involve consultation with the structures designated in accordance with Article 6(2)(b).

FINANCIAL PROVISIONS

1. Flat-rate grants, scales of unit costs and prizes

Flat-rate grants and/or scales of unit costs, as provided for in Article 181(1) of Commission Regulation No 2342/2002 may be used in the case of all actions referred to in Article 4.

Flat-rate grants may be used up to a maximum of EUR 25 000 per partner within a grant agreement. They may be combined up to a maximum of EUR 100 000 and/or used in conjunction with scales of unit costs.

The Commission may provide for the award of prizes in relation to activities undertaken in the framework of the programme.

2. Partnership agreements

Where actions under the programme are supported by means of framework partnership grants, pursuant to Article 163 of Regulation (EC, Euratom) No 2342/2002, such partnerships may be selected and funded for a five-year period, subject to a lightweight renewal procedure.

3. Public higher education institutions or organisations

All higher education institutions and organisations specified by Member States which have received over 50% of their annual revenues from public sources over the last two years, or which are controlled by public bodies or their representatives, shall be treated by the Commission as having the necessary financial, professional and administrative capacity, together with the necessary financial stability to carry out projects under the programme; they shall not be required to present further documentation to demonstrate this. Such institutions or organisations may be exempted from auditing requirements pursuant to Article 173(4) of Regulation (EC, Euratom) No 2342/2002.

4. Applicants' professional competencies and qualifications

The Commission may decide in accordance with Article 176(2) of Regulation (EC, Euratom) No 2342/2002 that specified categories of beneficiaries have the professional competencies and qualifications required to complete the proposed action or work programme.

5. Anti-fraud provisions

Commission decisions taken under Articles 7, the contracts and agreements resulting from them, as well as agreements with participating third countries, shall provide in particular for supervision and financial control by the Commission (or any representative authorized by it), including by the European Anti-fraud Office (OLAF), and for audits - if necessary on the spot - by the Court of Auditors.

The beneficiary of a grant shall ensure that, where applicable, supporting documents in the possession of partners or members are made available to the Commission.

The Commission may have an audit of the use made of the grant carried out either directly by its own staff or by any other qualified outside body of its choice. Such audits may be carried out throughout the lifetime of the agreement and for a period of five years from the date of closure of the project. Where appropriate, the audit findings may lead to recovery decisions by the Commission.

Commission staff and outside personnel authorised by the Commission shall have an appropriate right of access, in particular to the beneficiary's offices and to all the information, including information in electronic format, needed in order to conduct such audits.

The Court of Auditors and OLAF shall enjoy the same rights, especially of access, as the Commission.

In addition, the Commission may carry out on-the-spot checks and inspections under the programme in accordance with Council Regulation (Euratom, EC) No 2185/96 concerning on-the-spot checks and inspections carried out by the Commission in order to protect the European Communities' financial interest against fraud and other irregularities.²²

For the Community actions financed under this decision, the notion of irregularity referred to in Article 1(2) of Regulation (EC, Euratom) No 2988/95 on the protection of the European Communities' financial interests²³ shall mean any infringement of a provision of Community law or any breach of a contractual obligation resulting from an act or omission by an economic operator, which has, or would have, the effect of prejudicing the general budget of the European Communities or allocations managed by them, by an unjustified item of expenditure.

²² OJ L 292, 15.11.1996, p.2

²³ OJ L 312, 23.12.1995, p.1

LEGISLATIVE FINANCIAL STATEMENT

The Action referred to in article 4(1)(b) as well as related technical support measures referred to in article 4(3) of this proposal are regulated by Regulations (EC) No 1085/2006, 1638/2006, 1905/2006 and 1934/2006 and Decisions (EC) No 599/2005 and 608/2006. They are thus not included in the lists, tables and figures given in this financial statement and will be additional to these figures. However, as the action referred to in article 4(1)(b) is an integral part of this programme, chapters 5, 6 and 7 of this financial statement do refer to it.

1. NAME OF THE PROPOSAL

Action programme for the enhancement of quality in higher education and the promotion of intercultural understanding through co-operation with third countries (Erasmus Mundus)

2. ABM / ABB FRAMEWORK

Policy Area: Education and culture

Associated Activity: Lifelong learning, including multilingualism

3. BUDGET LINES

3.1. Budget lines (operational lines and related technical and administrative assistance lines (ex- BA lines) including headings

15 02 02 05 (Erasmus Mundus), 15 01 04 14 (Erasmus Mundus administrative expenditure), 15 01 04 30 (partly Executive Agency)

3.2. Duration of the action and of the financial impact

2009-2013

3.3. Budgetary characteristics

Budget line	Type of expenditure		New	EFTA contribution	Contributions from applicant countries	Heading in financial perspective
15 02 02 05	Non-comp	Diff ²⁴	NO	YES	YES	No 1.a
15 01 04 14	Non-comp	Non-diff ²⁵	NO	YES	YES	No 1.a
15 01 04 30	Non-comp	Non-diff	NO	YES	YES	No 1.a

²⁴ Differentiated appropriations

²⁵ Non-differentiated appropriations

4. SUMMARY OF RESOURCES

4.1. Financial Resources

4.1.1. Summary of commitment appropriations (CA) and payment appropriations (PA)

EUR million (to 3 decimal places)

Expenditure type	Section no.		2009	2010	2011	2012	2013	2014 and later	Total
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Operational expenditure²⁶

Commitment Appropriations (CA)	8.1.	a	90,25	92,52	94,1	95,86	98,54		471,27
Payment Appropriations (PA)		b	63,175	91,839	93,626	95,332	97,736	29,562	471,27

Administrative expenditure within reference amount²⁷

Technical & administrative assistance (NDA)	8.2.4.	c	4,418	4,458	4,478	4,508	4,558		22,42
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TOTAL REFERENCE AMOUNT

Commitment Appropriations		a+c	94,668	96,978	98,578	100,368	103,098		493,69
Payment Appropriations		b+c	67,593	96,297	98,104	99,84	102,294	29,562	493,69

Administrative expenditure not included in reference amount²⁸

Human resources and associated expenditure (NDA)	8.2.5.	d	0,936	0,936	0,981	0,981	0,981	0	4,815
Administrative costs, other than human resources and associated costs, not included in reference amount (NDA)	8.2.6.	e	0,187	0,187	0,187	0,187	0,187	0	0,935

Total indicative financial cost of intervention

TOTAL CA including cost of Human Resources		a+c +d+ e	95,791	98,101	99,746	101,536	104,266	0	499,44
TOTAL PA including cost of Human Resources		b+c +d+ e	68,716	97,42	99,272	101,008	103,462	29,562	499,44

²⁶ Expenditure that does not fall under Chapter 15 01 of the Title 15 concerned.

²⁷ Expenditure within article 15 01 04 of Title 15.

²⁸ Expenditure within chapter 15 01 other than articles 15 01 04 or 15 01 05.

4.1.2. *Compatibility with Financial Programming*

X Proposal is compatible with existing financial programming.

Proposal will entail reprogramming of the relevant heading in the financial perspective.

Proposal may require application of the provisions of the Interinstitutional Agreement²⁹ (i.e. flexibility instrument or revision of the financial perspective).

4.1.3. *Financial impact on Revenue*

X Proposal has no financial impact on revenue

Proposal has financial impact

4.2. **Human Resources FTE (including officials, temporary and external staff) – see detail under point 8.2.1.**

Annual requirements	2009	2010	2011	2012	2013
Total number of human resources	33	34	36	37	38

5. **CHARACTERISTICS AND OBJECTIVES**

5.1. **Needs to be met in the short or long term**

Higher education in the context of globalisation

Higher education is subject to a phenomenon of growing internationalisation as a response to the process of globalisation. In developing its higher education systems, the Community and its Member States must therefore seek to prepare their citizens and their workforce for a global environment by including an international dimension in an appropriate and efficient way.

The quest for excellence in higher education has recently become a strong *leitmotiv* in Community initiatives in the field. Joint programmes combining excellent departments across Europe and beyond will reinforce world-class excellence at European universities and reduce the attractiveness gap between Europe and other world regions.

At the same time, the Community has a mission to contribute to the development of high-quality higher education in third countries to the mutual benefit of higher education institutions, students and academics in Europe and beyond. Higher education institutions in specific third countries need to increase their international cooperation capacity.

²⁹ See points 19 and 24 of the Interinstitutional agreement.

But structural cooperation is not enough. European universities need to attract top talent, both students and academics. An increase in the number of highly talented international students boosts the ability of higher education, business and government to engage in research and development.

However, also the stimulation of mass mobility of students to achieve high mobility rates between countries can serve to create incentives for higher education institutions to collaborate and undertake joint work in curriculum development and other areas, with potentially high gains for those who undertake this work.

Europe's status as a centre of excellence in learning is not always fully understood in third countries. Attractiveness is not only about excellence in absolute terms, but also about perception. A European higher education identity as a brand for excellence in teaching and research needs to be created. In more general terms, higher education can also help to promote the visibility of EU policies in third countries, including its external policies.

Promoting inter-cultural ties and understanding

From a political and cultural perspective, academic exchange can promote mutual understanding between peoples and counter the risk of widening the inter-cultural divide between European and other cultures. In hosting foreign students and researchers, higher education institutions help to bring individuals from different cultures into contact with each other and through their teaching can help to provide foreign students with a better understanding of the culture of the host country.

5.2. Value-added of Community involvement and consistency of the proposal with other financial instruments and possible synergy

There is a clear European added value if action in the field of higher education cooperation with third countries is taken at European Union level. There are marked differences in the approach of European countries towards the stimulation of mobility from third-country students. Some EU Member States have established programmes for mobility, whereas others are less active in this area. The objectives of existing national programmes vary and are not fully consistent or integrated. National schemes, furthermore, do not contribute to strengthening the profile of a European higher education area that goes beyond the sum of its individual components. In this respect, an Erasmus Mundus programme – unlike national programmes - attracts students to study in more than one European country. An integrated European approach can thus bring substantial benefits.

Given the central role of higher education in social, cultural and economic policies, there are many connections between this programme proposal and other Community policies. Due account has therefore been taken of related Community programmes and objectives.

5.3. Objectives, expected results and related indicators of the proposal in the context of the ABM framework

The overall aim and general objectives of the new Erasmus Mundus programme are described in Article 3 of the decision.

The operational objectives of the proposal as outlined in the Annex to the decision are:

- to help develop high-quality joint master and doctoral programmes offered by a group of European and possibly third-country higher education institutions;

- to grant full-study scholarships to the most talented European and third-country students to follow these joint programmes as well as to grant short-term scholarships to European and third-country academics of outstanding quality to carry out research or teaching assignments as part of these joint programmes;
- to help develop broad co-operative partnerships between European and third-country higher education institutions as a basis for short- or long-term exchange of students and academics at all levels of higher education with a view to enhancing the international co-operation capacities of higher education institutions in third countries;
- to support transnational initiatives, analyses, studies, projects, events and other activities aimed at enhancing the attractiveness of European higher education in the world.

The related indicators for each operational objective are listed in table 8.1 below.

5.4. Method of Implementation (indicative)

X *Centralised Management*

X directly by the Commission

X indirectly by delegation to:

X executive Agencies

bodies set up by the Communities as referred to in art. 185 of the Financial Regulation

national public-sector bodies/bodies with a public-service mission

Shared or decentralised management

with Member States

with third countries

Joint management with international organisations (please specify)

6. MONITORING AND EVALUATION

6.1. Monitoring system

A monitoring system will be put in place to ensure the highest quality of outcome and the most efficient use of resources. Monitoring will run throughout the life of the programme. It will be based on feedback about the programme at institutional level, at faculty and staff level, and also at student level, including data review, and data collection through targeted surveys and interviews.

6.2. Evaluation

6.2.1. *Ex-ante evaluation*

An extended impact assessment integrating ex-ante evaluation requirements (including an interview programme with major stakeholders in the field of higher education cooperation with third countries) has been undertaken. Following a comparative assessment of available policy options, the preferred policy option was identified and its impact, risks and assumptions as well as cost-effectiveness were assessed. This proposal is fully consistent with the conclusions of the assessment.

An open online consultation of stakeholders was part of the extended impact assessment. In total, 417 replies were received to the consultation. The main messages given by respondents were:

- The needs analysis and objectives of the current programme are still valid and consistent;
- The current actions of the programme should be continued with some modifications: include full-study scholarships for European students and extend the programme to the doctoral level;
- The funds are appropriately distributed between actions and beneficiaries; however, funds for joint programmes should be increased;
- The management structure of the current programme was found to be working well.

The key messages coming out of the open consultation were taken on board in the current proposal.

6.2.2. *Measures taken following an intermediate/ex-post evaluation (lessons learned from similar experiences in the past)*

The external interim evaluation of the current Erasmus Mundus programme came up with a series of recommendations for the future programme which have been taken into consideration for the development of this proposal. The key recommendations were:

- Extend the programme to the doctoral level;
- Include full-study scholarships for European students into the programme;
- Integrate third-country institutions into joint European programmes;
- Increase the role of National Structures in programme monitoring, including information and dissemination grants to such structures;
- Step up measures on quality assurance of selected projects;
- Maintain unit costs for scholarships and increase flat rates for joint programmes.

6.2.3. *Terms and frequency of future evaluation*

Three years after the start of the programme, an external interim evaluation will be undertaken of the results achieved and of the qualitative aspects of the implementation of the programme. Two years after the end of the programme, an external ex-post evaluation on the results and impacts of the programme will be submitted.

7. ANTI-FRAUD MEASURES

See Article 5 of the financial provisions of the Annex to the decision.

8. DETAILS OF RESOURCES

8.1. Objectives of the proposal in terms of their financial cost

A detailed breakdown of the financial costs for Action 1 and Action 3 is given below. An indicative breakdown of the financing of Action 2 is presented in the text of the Explanatory Memorandum - Part 4. Budgetary Implication. The detailed programming and the yearly allocations for each envelop contributing to the global indicative amount of 460 million euros³⁰ for Action 2 will be established at a later stage according to the rules and procedures of each instrument and the European Development Fund, but not later than 1st July 2008 for the period 2009-2010 and 1st July 2010 for the period 2011-2013.

Commitment appropriations in EUR million (to 3 decimal places)

(Headings of Objectives, actions and outputs should be provided)	Type of output	Av. cost	Year 2009		Year 2010		Year 2011		Year 2012		Year 2013		TOTAL		
			No. outputs	Total cost	No. outputs	Total cost	No. outputs	Total cost	No. outputs	Total cost	No. outputs	Total cost	No. outputs	Total cost	
OPERATIONAL OBJECTIVE No.1															
Action 1A: Joint Masters Programmes															
	Output	Joint masters programmes	0,03	110	3,3	118	3,54	128	3,84	138	4,14	150	4,5	150	19,32
Action 1B: Joint doctoral programmes															
	Output	Joint doctoral programmes	0,05	10	0,5	20	1,0	25	1,25	30	1,5	35	1,75	35	6,0

³⁰ The indicative contributions from the different external instruments and the European Development Fund are as follows: ENPI: 140 million euros, DCI: 240 million euros, ICI: 20 million euros, IPA: 30 million euros, 10th EDF: 30 million euros.

Sub-total Objective 1			120	3,8	138	4,54	153	5,09	168	5,64	185	6,25	185	25,32
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OPERATIONAL
OBJECTIVE No.2

**Action 1C:
Scholarships**

Output 1	Scholarships for third-country students at masters level	0,0456 ³¹	1320	60,192	1062	48,4272	1024	46,6944	966	44,0496	900	41,04	5272	240,4032
Output 2	Scholarships for European students at masters level	0,0183 ³²	660	12,078	708	12,9564	640	11,712	690	12,627	750	13,725	3448	63,0984
Output 3	Scholarships for third-country academics at masters level	0,0145	330	4,785	354	5,133	384	5,568	414	6,003	450	6,525	1932	28,014
Output 4	Scholarships for European academics at masters level	0,0145	330	4,785	354	5,133	384	5,568	414	6,003	450	6,525	1932	28,014
Output 5	Scholarships for third-country students at doctoral level	0,08 ³³	0	0	80	6,4	100	8,0	120	9,6	140	11,2	440	35,2

³¹ Average amount. The actual scholarship depends on the length of the masters course (between one and two years). Reference amount: EUR 24,000 per year. This amount takes into account a yearly inflation of 2%.

³² Average amount. The actual scholarship depends on the length of the masters course (between on and two years). Reference amounts: EUR 11,000 per year if mobility also to third country; EUR 9,000 per year if only inter-European mobility. These amounts take into account a yearly inflation of 2%.

³³ Average amount for three-year scholarship. Reference amounts: EUR 123,000 for employment contract (very unlikely option); EUR 78,000 for stipend (most likely option). These amounts take into account a yearly inflation of 2%.

Output 6	Scholarships for European students at doctoral level	0,09 ³⁴	0	0	60	5,4	75	6,75	90	8,1	105	9,45	330	29,7
Output 7	Insurance scheme for students	1,0	1	1,0	1	1,0	1	1,0	1	1,0	1	1,0	1	5,0
Sub-total Objective 2			2641	82,84	2619	84,4496	2608	85,2924	2695	87,3826	2796	89,465	13355	429,4296
OPERATIONAL OBJECTIVE No.4														
Action 3: Attractiveness projects														
Output 1	Attractiveness projects	0,2	11	2,2	11	2,2	11	2,2	8	1,6	8	1,6	49	9,8
Output 2	Alumni Association	0,3	1	0,31	1	0,2304	1	0,3176	1	0,3374	1	0,325	1	1,5204
Output 3	Information grants for National Structures	0,1	11	1,1	11	1,1	12	1,2	9	0,9	9	0,9	52	5,2
Sub-total Objective 4			23	3,61	23	3,5304	24	3,7176	18	2,8374	18	2,825	102	16,5204
TOTAL COST			2784	90,25	2780	92,52	2785	94,1	2881	95,86	2999	98,54	13642	471,27

³⁴ Average amount for three-year scholarship. Reference amounts: EUR 100,000 for employment contract (most likely option); EUR 60,000 for stipend (unlikely option). These amounts take into account a yearly inflation of 2%.

8.2. Administrative Expenditure

8.2.1. Number and type of human resources

Types of post		Staff to be assigned to management of the action using existing and/or additional resources (number of posts/FTEs)				
		Year 2009	Year 2010	Year 2011	Year 2012	Year 2013
Officials or temporary staff ³⁵ (15 01 01)	A*/AD	5	5	5	5	5
	B*, C*/AST	3	3	3	3	3
Staff financed ³⁶ by art. 15 01 02		0	0	1	1	1
Other staff ³⁷ financed by art. 15 01 04 30		25	26	27	28	29
TOTAL		33	34	36	37	38

8.2.2. Description of tasks deriving from the action

- Programme Managers (A): responsible for programme implementation, monitoring and evaluation;
- Assistant Programme Managers (B): assistance to programme managers in their tasks;
- Finance and Contracts Assistants (B): responsible for management of grants and contracts;
- Information Officers (A/B): responsible for information, dissemination and exploitation of results;
- Administrative Assistants (C): administrative and secretarial support to A and B-level personnel.

8.2.3. Sources of human resources (statutory)

- Posts currently allocated to the management of the programme to be replaced or extended
- Posts pre-allocated within the APS/PDB exercise for year n
- Posts to be requested in the next APS/PDB procedure

³⁵ Cost of which is NOT covered by the reference amount

³⁶ Cost of which is NOT covered by the reference amount

³⁷ Cost of which is included within the reference amount. This personnel is assigned to the Executive Agency.

- Posts to be redeployed using existing resources within the managing service (internal redeployment)
- Posts required for year n although not provided for in the APS/PDB exercise of the year in question

8.2.4. *Other Administrative expenditure included in reference amount (15 01 04 14 – Expenditure on administrative management)*

EUR million (to 3 decimal places)

Budget line (number and heading)	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	TOTAL
1 Technical and administrative assistance (including related staff costs)						
Executive agencies	3,339	3,423	3,482	3,547	3,646	17,437
Other technical and administrative assistance						
- <i>intra muros</i>						
- <i>extra muros</i>	1,079	1,035	0,996	0,961	0,912	4,983
Total Technical and administrative assistance	4,418	4,458	4,478	4,508	4,558	22,42

8.2.5. *Financial cost of human resources and associated costs not included in the reference amount*

EUR million (to 3 decimal places)

Type of human resources	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	TOTAL
Officials and temporary staff (15 01 01)	0,936	0,936	0,936	0,936	0,936	4,68
Staff financed by Art 15 01 02 (END, contract staff, etc.) (specify budget line)	0	0	0,045	0,045	0,045	0,135
Total cost of Human Resources and associated costs (NOT in reference amount)	0,936	0,936	0,981	0,981	0,981	4,815

Calculation– *Officials and Temporary agents*

0,117 per year and person

Calculation– *Staff financed under art. 15 01 02*

0,045 per year and DNE (detached national expert)

8.2.6. Other administrative expenditure not included in reference amount

EUR million (to 3 decimal places)

	Year 2009	Year 2010	Year 2011	Year 2012	Year 2013	TOTAL
15 01 02 11 01 – Missions	0,025	0,025	0,025	0,025	0,025	0,125
15 01 02 11 02 – Meetings & Conferences	0,116	0,116	0,116	0,116	0,116	0,58
15 01 02 11 03 – Committees (management and advisory)	0,046	0,046	0,046	0,046	0,046	0,23
15 01 02 11 04 – Studies & consultations	0	0	0	0	0	0
15 01 02 11 05 - Information systems	0	0	0	0	0	0
2 Total Other Management Expenditure (15 01 02 11)	0,187	0,187	0,187	0,187	0,187	0,935
3 Other expenditure of an administrative nature (specify including reference to budget line)	0	0	0	0	0	0
Total Administrative Expenditure, other than human resources and associated costs (NOT included in reference amount)	0,187	0,187	0,187	0,187	0,187	0,935

Calculation - *Other administrative expenditure not included in reference amount*

Missions: 30 missions of up to 2 days at €650 + 5 missions of 1 week at €1,000 (per year)

Meetings: €1,160 per participant (€860 travel + €150 per diem * 2 days) * 100 participants (per year)

Committees: €860 per participant * 54 participants (per year)

The needs for human and administrative resources shall be covered with the allocation granted to the managing DG in the framework of the annual allocation procedure.