

17th – 19th November 2024 – Milan

TCA International - **Synergy of funds**

Transfer of ESF Plus funds to Erasmus+ to foster participation and inclusion in KA131 in Germany

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Our Goal: Increase Participation

- Increase participation in Erasmus+ for all students
- Enabling students underrepresented in mobility due to financial barriers to go abroad
- Make Erasmus+ more equitable



Source: Inclusion A to Z, Published in 2022 by SALTO-YOUTH Inclusion & Diversity Resource Centre www.SALTO-YOUTH.net/inclusion/

Obstacles to Mobility

- International mobility of students is significantly influenced by socio-demographic characteristics
- **Funding and scholarships are one of the biggest barriers to mobility:**
*“The scholarship was a bit too low to live in an expensive country like Sweden – had to work part-time and ask my parents for help to live and allow myself more than just eating at home but travelling, etc.” **
- Insufficient funding is the main reason for not going abroad:
„Almost three quarters (72%) of non-mobile respondents reported insufficient funding as their main reason for not going abroad” **

* Erasmus Student Network (2022). Understanding the experience and needs of exchange students in challenging times. ESNsurvey – XIV edition.

** Allinson, K. Gabriels W. (2021) “Maybe it will be different abroad” Student and Staff Perspectives on Diversity and Inclusion in student exchanges, Social Inclusion and Engagement in Mobility, SIEM. <https://siem-project.eu>

Challenges in Achieving our Goals

- **Limited budget in Erasmus+ KA131**
- High demand for funds from higher education institutions due to increasing mobility numbers
- Increasing financial needs of participants due to rising cost of living/ inflation
- Budget allocation in Erasmus+ is progressive from 2021-2027
→ Financing gap in the first years of programme generation

Our Solution: Increase of Funds

1. **Transfer of additional 57 Mio. from ESF Plus to KA131** on a degressive basis from 2022–2027 to balance the increasing Erasmus+ budget
2. **Increase the regular Erasmus+ grants for student mobility** by one third to the highest possible ceiling (2022: EUR 490/ 540/ 600 per month) to make mobility a reality for all
3. **Support students with financial barriers with additional funding** by expanding the target groups of students with fewer opportunities who are eligible for the top up amount of 250 EUR per month

Allocation and Reporting of ESF Funds

- **No specific ESF Plus rules** for the use of funds transferred at Brussels level
- ESF Plus funds are included in the contribution agreement in a separate line „European Social Fund (ESF Plus) contribution (Heading 2)”
- KA131 funds are allocated to beneficiaries according to the usual process → no separate designation of ESF Plus funds at this stage
- Beneficiaries will report on participants with fewer opportunities receiving a top up in the Beneficiary Module
- **NA DAAD assigns budget for mobilities funded by ESF Plus at validation stage in the Project Management Module.** This ensures regional balance (Eastern/Western Germany)

Advantages of ESF Plus Budget Transfer

- **No differentiation between target groups funded by ESF Plus and Erasmus+:** All target groups “fewer opportunities” are eligible under ESF+ funding as well as regular Erasmus+ funding
- **No additional/ different processes for distribution of funds:** No separate distribution of ESF+ funds at allocation stage
- **No additional/ different processes** for selection of participants and reporting of mobilities **for higher education institutions**
- **Foster social inclusion:** Additional ESF funds enabled to raise student Erasmus+ grants to the max. ceiling and significantly expand the target groups for “fewer opportunities”

Challenges of ESF Plus Budget Transfer

- Changes introduced in connection with ESF Plus funding must be applied to all participants
- Funding that exceeds the ESF funds must be covered from the regular Erasmus+ budget

→ **Advantage**

Funding for participants is guaranteed: Equal financial support for all students

→ **Risks**

Higher education institutions' demand for funds cannot be met in future

Stagnating mobility numbers or shortening of mobility durations due to insufficient funds

Transfer of Funds: Legal Basis – General

- **Regulation (EU) 2021/1060** of the European Parliament and of the Council of 24 June 2021 laying down common provisions on the [...] European Social Fund Plus
Contains regulation for the transfer of (ESF+) funds to other programmes
- **Erasmus+ REGULATION (EU) 2021/817**
Contains regulation for the receipt of (ESF+) funds in the Erasmus+ Programme
- **Partnership Agreement (PV)** between Germany and the European Commission for the implementation of the funds 2021–2027 under regulation EU 2021/1060
Regulates contractually the transfer and receipt of funds between programmes in accordance with funding priorities of the federal government (Germany: **Operational Programme** for the implementation of the ESF+ in the funding period 2021–2027)

Transfer of Funds: Legal Basis

Articles on the transfer of funds:

- **Regulation (EU) 2021/1060**

Article 26 (1), Transfer of resources: Member States may request, in the Partnership Agreement [...], the transfer of up to 5 % of the initial national allocation of each Fund to any other instrument under direct or indirect management, where such possibility is provided for in the basic act of such an instrument...

- **Erasmus+ REGULATION (EU) 2021/817**

Financial Provisions, Article 17, Budget (8): Resources allocated to Member States under shared management may, at the request of the Member State concerned, be transferred to the Programme subject to the conditions set out in Article 26 of a Regulation of the European Parliament and of the Council laying down common provisions on the [...], the European Social Fund Plus,...

Article 32 Cumulative and alternative financing (1): The Programme shall be implemented so as to ensure its overall consistency and complementarity with other relevant Union policies, programmes and funds, in particular those relating to ... education and training [...] and social inclusion...

Transfer of Funds: Implementation

Partnership Agreements on EU funds 2021–2027 between the Federal Republic of Germany and the European Commission

https://commission.europa.eu/publications/partnership-agreement-germany-2021-2027_en

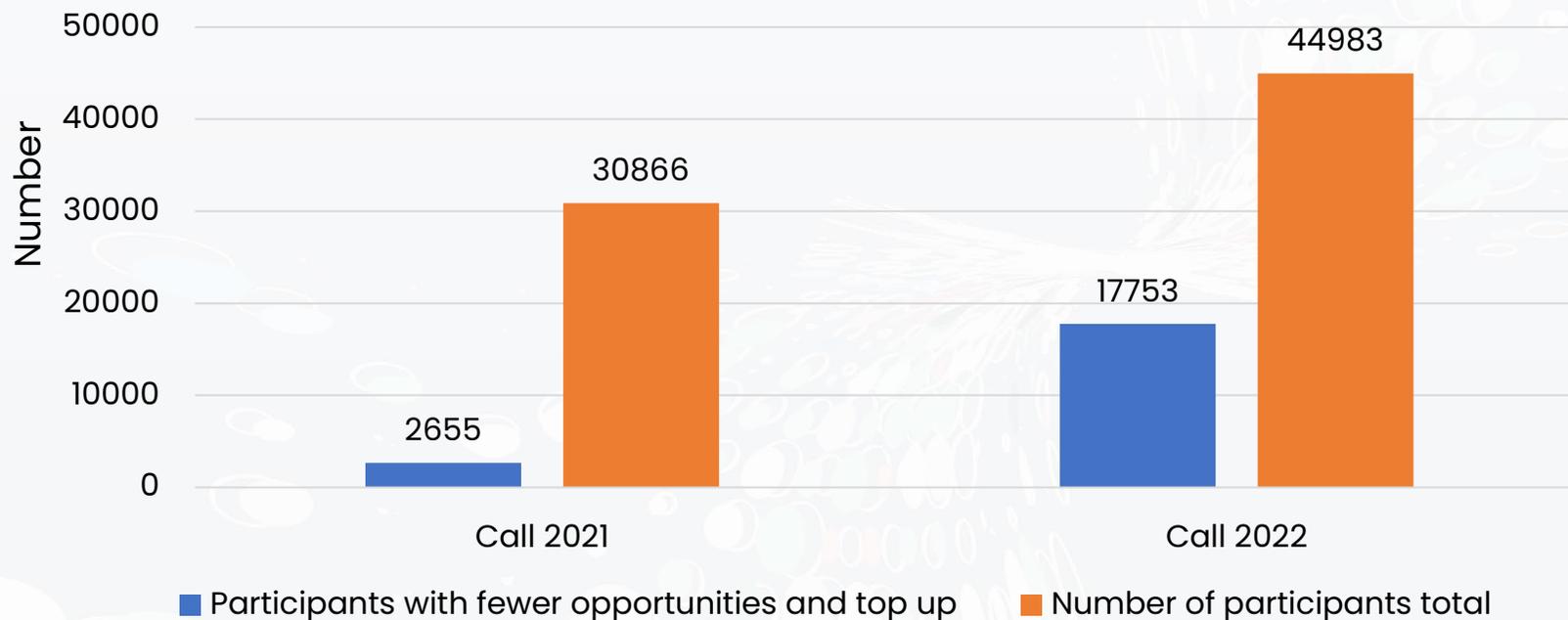
- 2.4.2 TRANSFERS TO INSTRUMENTS WITH DIRECT OR INDIRECT MANAGEMENT OF FUNDS
- On the basis of [...] funds to strengthen Key Action 1 a (Learning Mobility of Higher Education Students) as defined in Article 5 (1a) of the ERASMUS+ Regulation shall be transferred to ERASMUS+ and administered in accordance with the rules applicable to ERASMUS+ through allocation by the EU Commission to the National Agency at the DAAD...
- To this end, the regular Erasmus+ grants for mobilities are to be increased. In addition, target groups underrepresented in mobility are to be addressed and financially supported specifically during their stay abroad.

Results: Target Groups Top up Funding

The Target groups of "students with fewer opportunities" have been defined based on national criteria by the NA DAAD in coordination with the Federal Ministry of Education and Research – BMBF based on national data on mobility patterns of students.

Target group „fewer opportunities“	Call 2021	Call 2022, 2023, 2024
Working students	Funding with top up optional	Funding with top up mandatory
First generation students	Funding with top up optional	Funding with top up mandatory
Students with disability or chronic illness	Funding with top up mandatory	Funding with top up mandatory
Students with children	Funding with top up mandatory	Funding with top up mandatory

Results: Top up Funding

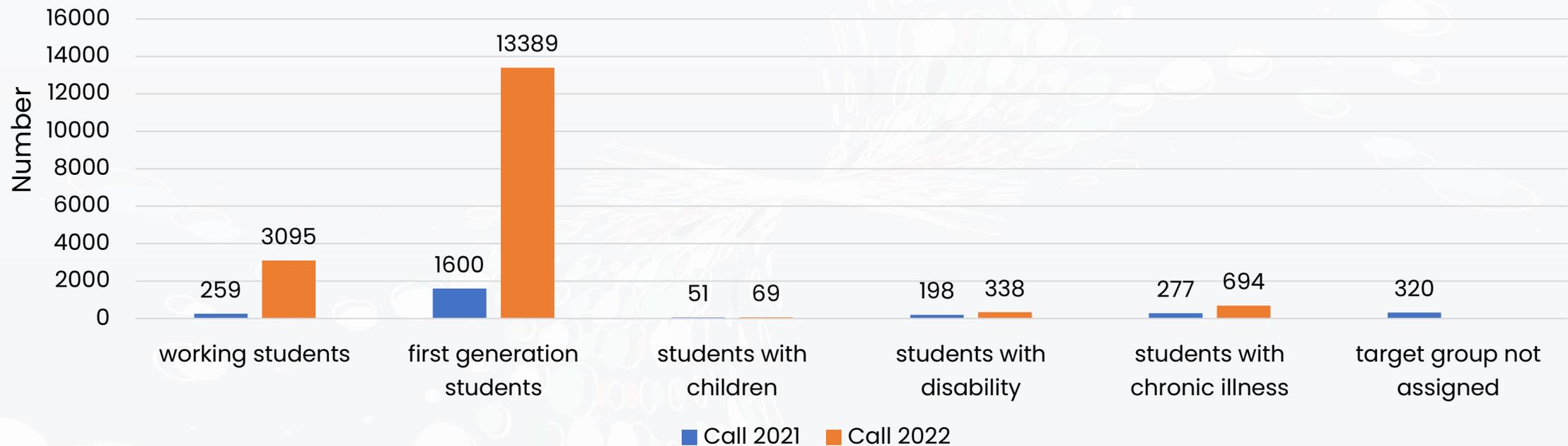


2021 - approx. 8.6% of students funded with top-up amount

2022 - approx. 39% of students funded with top-up amount

Preliminary results

Results: Top up Funding by Target Group



Preliminary results

ESF Plus Funds – Budget Allocation

The ESF+ funds are transferred on a degressive basis and support to the target groups will be ensured through an increase in the Erasmus+ budget in the current programme generation.

	Call 2021	Call 2022	Call 2023	Call 2024	Call 2025	Call 2026	Call 2027	Total
EUR for developed regions *	0	10.050.000	8.040.000	6.700.000	5.360.000	4.690.000	3.350.000	38.190.000
EUR for transition regions **	0	4.950.000	3.960.000	3.300.000	2.640.000	2.310.000	1.650.000	18.810.000
EUR total		15.000.000	12.000.000	10.000.000	8.000.000	7.000.000	5.000.000	57.000.000
Number of mobilities funded		3420	2737	2281	1825	1597	1140	13.000

*Western Germany ** Eastern Germany

Implementation: Authorities Involved

1. At national level:

- National Authority responsible for ESF+ (in Germany: BMAS – Federal Ministry of Labour and Social Affairs)
- National Authority responsible for Erasmus+ (in Germany: BMBF – Federal Ministry of Education and Research)
- National Agency: NA DAAD

2. Negotiations between EU COM and Germany

- BMAS – ESF Plus

3. Implementation

- European Commission: DG EAC
- National Authority: BMBF
- NA DAAD

Any Questions?



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