

Subject: The merging and splitting exercise of the Higher Education Institutions (HEI) holding an Erasmus Charter

Introduction

Currently, over 5.000 higher education institutions hold an Erasmus University Charter. All these institutions have to reapply to be awarded with the new Erasmus Charter for Higher Education (ECHE) in the framework of the new 2014-2020 EU programme for Education, Training, Culture and Sport (hereafter the "Programme").

The European Commission and the Executive Agency are managing the entire selection process and are keeping the database up to date. As there are each year a number of changes in the status of higher education institutions (mergers between institutions, split of an institution,..), the Commission and the Executive Agency need to be informed about those cases. The procedure to do so is explained in this note. In most cases, the newly created institution should reapply for an ECHE during the first available ECHE call. However, in order to ensure that the institution can continue to participate in the Programme, transitional arrangements are foreseen. These are also set out in this note:

Common identified cases: (see diagram in annex)

A) A **new institution** (new legal status) is founded that regroups other former institutions either:

- A1) completely $(A + B + C \dots) \Rightarrow H$
- A2) partially $(A + B + C \dots) \Rightarrow H + A_1 + C_1$

B) An **existing institution** that holds a Charter absorbs former institutions either:

- B1) completely $(A + B + C \dots) \Rightarrow A$
- B2) partially $(A + B + C \dots) \Rightarrow A + C_1$

C) A **split of an institution** $A \Rightarrow B \text{ and } C$

Consequences:

Case A1) The newly established institution – **H** should apply for a new Charter (first available ECHE call).

Case B1) In case institutions merge with an existing institution, only the ID code and the Charter of the absorbing institution **A** remains.

Cases A2, B2) If parts of one or more of the original institutions remain active and autonomous after the merge **A₁** **C₁** those parts keep the respective ID code

and Charter only if the National Agencies confirm that the institution is always recognized as a higher education institution and has the capacity to implement mobility and cooperation activities in respect of the ECHE fundamental principles.

(for the case of creation of a new institution **H** refer to Case A1) (for the case of absorbing institution **A** refer to Case B1).

Case C) The split parts **B** and **C** have to reapply for a new Charter (first available ECHE call).

Transitional period

At the time of the formal decision of the merge/ split and in any case before 31 January.

Case A1

- 1) The new legal institution must notify the merger to the National Agency.
- 2) The National Agency will request the National Authority to confirm the eligibility of the new institution as a higher education institution
- 3) The National Agency will notify the EACEA about the merger of institution.
- 4) EACEA will forward to the institution the special application form and instructions that includes identification data, respect of fundamental principles and new Erasmus Policy Statement - Overall Strategy.
- 4) The new legal institution will have to send the special application form filled and signed by the legal representative back to Executive Agency (EACEA) within 15 days period after the reception of the initial instructions. The application form should state that the requirements of the Charter of the previous institutions are respected.
- 5) The special application form will be evaluated by the ECHE Evaluation Committee. The ID codes of the previous institutions remain valid for the ongoing mobility activities, ensuring the continuity of the actions; the new institution will be obliged to introduce the intermediate and final reports to the National Agency under those codes.
- 6) EACEA will allocate a new reference number and a new ID code to the institution.
- 6) The ECHE Evaluation Committee (EAC / EACEA) will adopt a decision on the award of a transitory Erasmus Charter for Higher Education or a rejection of the application.
- 7) If evaluated positively, the new reference number and a new ID code allow, during the transitional period, the new institutions to apply for the mobility grants to the National Agency.
- 8) The institution will use the new ID code when applying to the next EUC open call.

Case B1:

- 1) The new legal institution must notify the merger to the National Agency.
- 2) The ID codes of the absorbed institution(s) remain(s) valid for the ongoing mobility activities, ensuring the continuity of the actions; the institution will be obliged to introduce the intermediate and final reports to the National Agency under those codes.
- 3) The ECHE of the absorbing institution remains valid for the whole duration of the Programme.

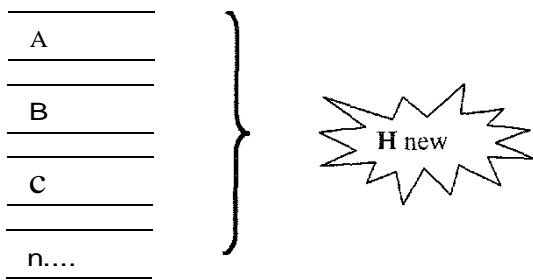
Case C:

The new institutions resulting from the split will keep the same Charter and ID code only during the period of completion of the mobility actions engaged by the previous one and will be obliged to introduce the corresponding reports to the National Agency.

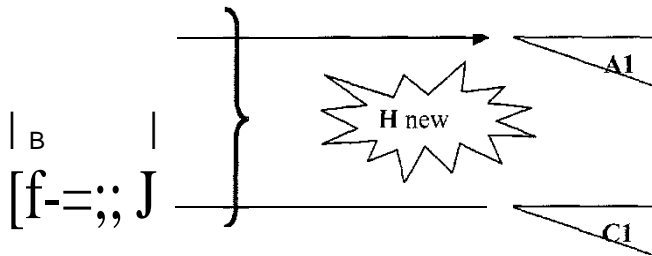
- 1) Each of the new created institutions must notify the split to the National Agency.
- 2) The National Agency will ask for the eligibility of the new institution to the National Authority and will inform EACEA.
- 3) EACEA will forward to the institution the specific form that includes identification data, respect of fundamental principles and new Erasmus Policy Statement - Overall Strategy.
- 4) Each of the new created institutions sends to Executive Agency (EACEA) - ECHE Evaluation Committee in the following 15 days the special form filled signed by the legal representative. The form states that the requirements of the Charter of the previous institutions are respected. The ID code of the previous institution remains valid for the ongoing mobility activities, ensuring the continuity of the actions; the new institution will be obliged to introduce the due reports to the National Agency under that code.
- 5) EACEA will allocate a new reference number and a new ID code to each of the institutions.
- 6) The ECHE Evaluation Committee (EAC / EACEA) decides on the specific form.
- 7) If evaluated positively, the new reference number and a new ID code allow, during the transitional period, the new institutions to apply for the mobility grants to the National Agency.
- 8) The institution will use the new ID code when applying to the next ECHE open call.

A) A **new institution** (new legal status) is founded that regroups other former institutions either:

A1) completely $(A + B + C + \dots) = H$

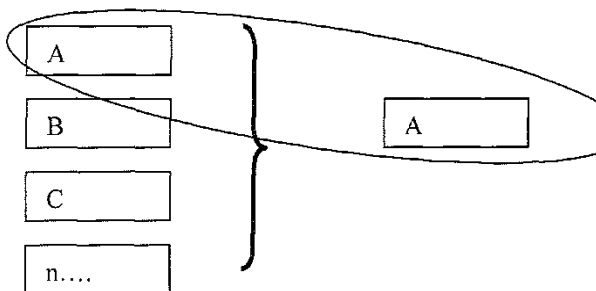


A2) partially $(A + B + C + \dots) = H + A1 + C1$

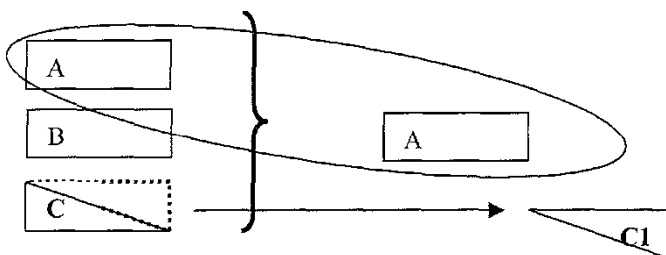


B) An **existing institution** that holds a Charter absorbs former institutions either:

81) completely $(A + B + C + \dots) = A$



82) partially. $(A + B + C + \dots) = A + C1$



C) A **split of an institution** $A = B \text{ and } C$

