

ANNEX 8

of the Commission Implementing Decision on the 2015 Annual Action programme for the
Partnership Instrument

Action Fiche for Schuman Fulbright Fellowships

1. IDENTIFICATION

Title of the action	Schuman Fulbright Fellowships			
Country(ies)/ Region	United States of America			
Total cost	Total estimated cost: € 590.000 Total amount of the EU budget contribution: € 350.000			
Total duration	54 months ¹			
Method of implementation	Direct management Grants – direct award			
Markers (from CRIS Dac form)	Rio Convention Markers	Not targeted	Significant objective	Main objective
	Biological diversity	X	<input type="checkbox"/>	<input type="checkbox"/>
	Combat desertification	X	<input type="checkbox"/>	<input type="checkbox"/>
	Climate change mitigation	X	<input type="checkbox"/>	<input type="checkbox"/>

2. RATIONALE AND CONTEXT

2.1. Summary of the action and its objectives

A fellowship scheme, co-funded by the European Commission and the US Department of State to allow mid-career professionals the opportunity to research or lecture for 3 to 9 months in any area of EU-US relations.

2.2. Context

The action contributes and supports the Europe 2020 strategy in its initiative called Agenda for new skills and jobs. The Agenda for new skills and jobs is one of the 7 flagship initiative of Europe 2020. It also supports the Youth on the Move initiative in the Strategy

¹ The total duration is calculated as from the adoption of the Financing Decision. As a result it takes into account of: (i) the contracting phase (indicatively 18 months); (ii) the implementation of the action (24 months); (iii) the closure phase (indicatively 12 months)

2.3. Lessons learnt

The Schuman-Fulbright programme has been running since 2002 and was one of the actions run under the renewed Agreement between the EC and the US for cooperation in higher education and vocational educational training signed in 2006. Since then, several evaluations of the programme took place, always very positive. The budget has been steadily increased as has the number of participants.

2.4. Complementary actions

Some MS have scholarship programmes with the US but this specific action benefits from the "Fulbright" experience and reputation which benefits the participants and open doors for them in larger companies in Europe and in the world. Fellows can also benefit from the large network of former Fulbright alumni. There is a complementarity also with Erasmus + Programme which supports mobility and joint degrees on wider subjects but which does not specifically at developing EU-US relations.

3. DETAILED DESCRIPTION

3.1. Objectives

The Schuman-Fulbright programme supports the EU agenda for new skills and jobs under Europe 2020, through the exchange of mid-career professionals using the framework of the US Fulbright programme. Grants fund fellowships for research and lecturing in the fields of US-EU relations, EU policy, or EU institutions.

The scheme is intended to create a cohort of high quality Europeans who have the chance to investigate policy areas of interest to the transatlantic relationship and act as ambassadors for European values while in the US, and then as ambassadors for EU-US relations upon their return.

3.2. Expected results and main activities

After a selection process taking place in all EU Member States, EU professionals receive fellowships from 3-9 months to spend in the United States. Grantees must arrange their own placement at an independent research centre, vocational training/professional institution or accredited university in the USA. The scheme funds up to 20 EU nationals per year to spend 3-9 months in the US, from the EU contribution. The size of the EU contribution amounts to a maximum of 29.000 € per grantee.

The US State Department pays for the reciprocal scheme whereby American, mid-career professionals receive fellowships to come to Europe and undertake lecturing or research, funding up to 15 US nationals to spend 3-9 months in the EU, paid for by the US contribution.

3.3. Risks and assumptions

Main assumption and risk are closely linked together. In fact, while it is assumed that high quality candidates willing to undertake the secondment will be found, a risk exists that not all of them will match the expected profile. However, risk seems limited in light of

experience over the last two years, where the number of EU applicants has doubled and quality of EU candidates has been very high. At the moment, the numbers of US applicants to come to Europe are less impressive and the US Dept. of State is undertaking promotional activities to publicise the fellowships.

3.4. Stakeholders

European young professionals in the field of EU-US transatlantic relations. Academic institutions and EU institutions could directly benefit from the results of the activities carried through this action.

4. IMPLEMENTATION ISSUES

4.1. Method of implementation

4.1.1 Grant - Direct award (direct management)

(a) Objectives of the grant

To provide grants to fund fellowships for research, and lecturing in the fields of US-EU relations, EU policy, or EU institutions (Schuman-Fulbright Fellowship).

(b) Justification of a direct grant

Under the responsibility of the Commission's authorising officer responsible (DG EAC based on the co-delegation in force between FPI and EAC) , the grant may be awarded without a call for proposals to the Belgium-Luxembourg Fulbright Commission, in accordance with the provisions of article 190(1)(f) of the RAP.

The EU and US authorities have jointly designated the Belgium-Luxembourg Fulbright Commission with this task since 1995 for the reason that actions carried out under the Schuman-Fulbright scheme have very specific characteristics as part of the wider Fulbright programme. This programme is only implemented through the network of national Fulbright commissions in Europe. EU grants are subject to the Financial Regulation and Rules of Application of the EU. Belgium-Luxembourg Fulbright Commission is therefore the only organisation combining expertise in implementing the Fulbright Programme and following the FR and its implementing rules as set out in the Schuman-Fulbright Scheme.

(c) Essential selection and award criteria

The selection criteria is given by Annex I of Council Decision of 4/12/2006 on the conclusion of the Agreement between the European Union and the United States of America renewing the co-operation programme in higher education and vocational education and training (2006/964/EC) provides that for the purpose of promoting "Schuman-Fulbright" grants and supporting grantees, the Parties may provide financial support to an organisation that they shall jointly designate.

The essential award criterion is the capacity and competence to fulfil the provisions set out in the above mentioned agreement with the US.

(d) Maximum rate of co-financing

Financing via this agreement is based on matching funds between the Parties following the laws and regulations, policies and programmes of the European Union and the United States. Maximum possible rate of co-financing² for this grant to the Belgium-Luxembourg Fulbright Commission is 60% of the eligible costs of the action.

The maximum possible rate of co-financing may be up to 100 % in accordance with Articles 192 of Regulation (EU, Euratom) No 966/2012 if full funding is essential for the action to be carried out. The essentiality of full funding will be justified by the responsible authorising officer in the award decision, in respect of the principles of equal treatment and sound financial management.

(e) Indicative trimester to conclude the grant agreement

The grant agreement will be concluded indicatively during Q4 of 2015. The contracting authority will be DG EAC based on the co-delegation in force between FPI and EAC.

4.1.2 Grants provided to fund fellowships for research and lecturing in the fields of US-EU relations, EU policy, and/or EU institutions (Schuman-Fulbright Fellowship)

- (a) The objectives of the grants are to create a cohort of high quality European professionals who have the opportunity to investigate policy areas of interest to the transatlantic relationship in the US. Grantees should have the skills to represent the EU as ambassadors for the programme and the energy and enthusiasm to promote the results of their work/research during the secondment to relevant stakeholders. This will benefit the EU-US relationship via mobility of mid-career professionals undertaking short research and outreach secondments. Successful proposals will address an issue of common concern from a comparative perspective and will bear significance for more than one EU member state. The intended area of research or study must deal with US-EU relations or current particular EU-related priorities.

Results should enhance the knowledge of the young professional participants on the EU-US relationship; increase their employability and their job attractiveness; and, finally, expand their network. Funding concerns around 15-20 EU nationals per year spending 3-9 months in the US.

- (b) Eligibility conditions of grantees

Preference will be given to candidates with two years of relevant professional or academic experience beyond the Bachelor's degree. EU professionals and professionals in training (decision-makers, policy-makers, individuals in industry, the media, politics, academia, and public administration) are encouraged to apply. Proficiency in English and a minimum of three months experience in two or more Member States is preferred.

² Article 192 FR – full financing of an external action

Candidates with permanent positions at the European Commission are ineligible to apply.

(c) Selection and award criteria of grantees

The selection committee consists of the European Commission, US Mission to the EU representatives and Fulbright alumni.

-Selection criteria: details of the educational and professional qualifications of the candidate; knowledge of public policy issues relevant to the substance of the proposal; and, where appropriate, knowledge of EU policies and of the relationship between the EU and the US in that policy area.

-Award criteria : relevance, quality and impact of the project proposed in terms of value-added input to the EU-US relationship, EU policy, as EU institutions. The results must be relevant to at least two Member States.

(d) EU contribution amounts to a maximum of 29.000 € per grantee (A unit contribution of EUR 3.000,00 per EU student per month to cover the mobility grants for the beneficiary and EUR 2.000,00 per EU student for travel costs)

(e) Indicative timing: September to December 2015

4.2. Indicative budget

Method of Implementation	Amount in EUR million
4.1.1 - Grant – direct award (direct management)	0.35
Total	0.35

4.3. Performance monitoring

The programme is run by the Commission for Educational Exchange between the United States and Belgium based in Brussels, who undertake pre-departure briefing and post-fellowship monitoring of the grantees are also obliged to final reports to Belgian Fulbright Commission. The European alumni are then called upon to help promote the benefits of the transatlantic relationship and the Schuman Fulbright programme around Europe.

The Commission may undertake additional project monitoring visits both through its own staff and through independent consultants.

4.4. Evaluation and audit

The Commission for Educational Exchange between the United States and Belgium produce an interim report after 12 months to check the progress of scholarship selection as well as a final report after 24 months when all the grantees have finished their secondments.

For this action or its components the Commission may carry out interim and/or final/ex-post evaluation(s) via independent consultants contracted by the Commission based on specific terms of reference.

Without prejudice to the obligations applicable to contracts concluded for the implementation of this action, the Commission may, on the basis of a risk assessment, contract independent audits or expenditure verification assignments.

As the "N+1" applies for contracting under this decision, external evaluations and audits, as well as additional external monitoring referred to under section 4.3 above, will be funded from sources other than those allocated to this specific action.

4.5. Communication and visibility

Promotion of the fellowship scheme is organised via a network of national Fulbright Commissions around Europe and via the Fulbright network in US higher education institutions. Grantees are actively encouraged to blog about their fellowships and are invited to make video testimonials on www.youtube.com/fulbrightbe.

All documentation and promotional material produced in the framework of the project shall bear the EU flag and mention that it is co-financed by the EU.