

## Statement on the Increase of the Scholarship Rates for Doctoral Students

Dear Federal Minister Stark-Watzinger,  
dear Members of the Bundestag Committee for Education, Research and Technology Impact Assessment [*Ausschuss für Bildung, Forschung und Technikfolgenabschätzung*],

as a free alliance of holders of doctoral scholarships from various foundations for the promotion of gifted students [*Begabtenförderungswerke*] it is our urgent concern to comment on the announced changes for early-stage researchers funded by scholarship programmes. In principle, we welcome the efforts of the Federal Ministry of Education and Research (BMBF) and the foundations for the promotion of gifted students to improve the situation of doctoral scholarship holders. However, these changes are by no means proportional to the significant increases in the cost of living, which currently cause holders of doctoral scholarships to face existential challenges!

Currently, scholarship holders in the doctoral funding programmes of the foundations for the promotion of gifted students receive €1,350, plus a research cost allowance of €100 per month. This amount must cover all living expenses, including social insurances, as well as all research costs. The last increase of scholarship rates dates back to 2016, almost seven years ago. At that time, monthly rates were raised from €1,150 to €1,350.

The BMBF has announced their plan to increase scholarship rates by a total of €300 from the winter semester 2023/24 onwards, staggered over a period of three years. The first increase of €100 is planned for this autumn, followed by two further increases 12 and 24 months later. Since many scholarship holders have been experiencing financial hardship for a considerable amount of time already - due to general price increases and soaring rents - a revision of the scholarship rate is urgently needed. This year's raise by €100 (approx. 7%) is nowhere near enough to offset the increased cost of living since 2016. Even with the planned increase, **scholarship rates still place doctoral scholarship holders on the edge of the poverty line!**

The fact that the increase is supposed to be financed from within the existing budget of doctoral funding and that **no additional funds will be made available by the BMBF** must also be seen as extremely problematic. The last time scholarship rates were increased in 2016, the BMBF did not enhance its grants to the foundations for the promotion of gifted

students. Instead, the foundations financed this increase of scholarship rates by redistributing their funds (reducing the number of doctoral scholarships awarded, reducing support programmes offered, etc.). **A sustainable improvement in the working conditions of doctoral scholarship holders requires additional financial resources! The urgently needed reforms in this context must neither play off the working conditions of current scholarship holders against the number of future [scholarship holders], nor be implemented at the expense of non-material support for scholarship holders [*ideelle Förderung*].**

Furthermore, the fact that doctoral scholarships are still not subject to compulsory social insurance weighs particularly heavily. In the future, scholarship holders will still have to pay their own contributions to voluntary statutory health and long-term care insurance. It is possible to apply for a health and long-term care insurance subsidy of €100 per month from the scholarship foundations. However, this covers only a third of insurance contributions, which currently total at just under €300 per month on average. The remaining two thirds still have to be financed privately, which is an enormous financial burden for many scholarship holders. With the increase of scholarship rates, contributions to health and long-term care insurance will rise even further, as these are calculated on the basis of one's monthly income. Thus, the increase of the scholarship rate by €100 € this year will ultimately only translate to an additional amount of around €80 available to scholarship holders.

Additionally, due to the lack of compulsory social insurance, doctoral scholarship holders are still not covered by statutory pension insurance and have no protection whatsoever - neither in the event of prolonged illness or unemployment, nor in matters of labour law. Any form of old-age and unemployment provision must be privately financed and organised. This poses a massive financial problem for many doctoral scholarship holders and regularly leads to extremely precarious living situations - even after successfully completing their doctorates. Therefore, in the medium term, **scholarships must be converted into employment contracts subject to mandatory social insurance contributions!** Until then, urgent measures must be taken to provide social security for scholarship holders.

Moreover, doctoral scholarship holders need planning security for the implementation of their doctoral projects. Currently, the standard funding period for scholarships amounts to two years, which can be extended a maximum of two times for a further six months, respectively. The BMBF is now supposedly increasing the standard funding period of the scholarships from two to three years, with the option of a one-time extension by six months. At a fundamental

level, these three or 3.5 years do not correspond to the actual duration of a doctorate in Germany, which takes just under six years on average. In accordance with the recommendations of various scientific institutions – including the German Science and Humanities Council [*Wissenschaftsrat*] - **the standard funding period of doctoral scholarships must be increased to three years, with the option of a one-year extension!**

However, there is not only an urgent need for action in regards to the standard funding period of the scholarships, but specifically in regards to the extension as envisaged by the BMBF. Up to date (September 13, 2023) the BMBF's auxiliary provisions concerning doctoral scholarships are still not available – only a few days before the start of the new calculation period for scholarships. Announcements by different funding foundations indicate that the six-month extension has been decreed bindingly only for those new scholarship holders who will be admitted into the doctoral scholarship programmes from October 2023 onwards. There seems to be no uniform regulation for current scholarship holders. Some funding organisations have already announced the extension of all of their doctoral scholarships, while others will only extend the duration of future scholarships. **This massive unequal treatment is unacceptable**; on the one hand, since all scholarship holders are affected equally by the short funding periods, on the other, because the resulting different standard funding periods of scholarships are at odds with the very basic principles of the promotion of gifted students [*Begabtenförderung*] according to which funding organisations are bound by guidelines issued by the BMBF, e.g. regarding the amount of funding and the maximum funding period. This means that the same parameters apply to all doctoral scholarship holders, regardless of their respective funding foundation. **In the interest of equality of opportunity, the standard funding periods of all doctoral scholarships – independent of the respective funding foundations – must be extended by uniform regulations on the part of the BMBF!**

In view of the imminent danger of a further precarisation of doctoral scholarship holders, we therefore demand:

- **the immediate and full increase of scholarship rates by the planned €300 per month this autumn**, financed through the provision of additional funds from the BMBF,
- **the reimbursement of the contributions to health and long-term care insurance in full for all scholarship holders** who do not have access to statutory health insurance,

- **the crediting of the funding period of the doctorate within the statutory pension insurance**, independent of completed school, study and training periods, which also must also be fully credited,
- **and the extension of the funding periods for all scholarship holders who are currently part of the doctoral funding programmes of the foundations for the promotion of gifted students**, also financed by the BMBF!

For the time being, the research allowance of €100 remains unaffected by the demands. Since inflation also influences research costs and as the entire academic sector is being affected by massive funding cuts, the research allowance will have to be subjected to a thorough review next year.

In addition, **the amount of the scholarship rate for doctoral scholarship holders must be independently reviewed by the BMBF every three years and adjusted** according to inflation rates, the trend of rental costs, price increases, etc.

The funding of doctoral students is an investment in the future of Germany's science and research sector and therefore of great societal importance. Adequate financial support is essential to ensure the quality of doctoral research projects and to maintain Germany's appeal as a centre of science and research, also in international comparison.

We would be pleased to enter into a personal exchange with you about the situation of doctoral scholarship holders and our associated demands, which are explained in more detail in the attachment.

Sincerely,

**Netzwerk Stipendienerhöhung** [Network for Increasing Scholarship Rates]

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## **Supplementary statements on the situation of doctoral scholarship holders:**

### **Necessity of the Increase**

Our demand of €300 is made up as follows: In a reply to a minor interpellation from the CDU/CSU parliamentary group in the Bundestag concerning the scholarship rates of the foundations for the promotion of gifted students, the Federal Government indicated a 16% increase in the cost of living measured by the official consumer price index between 2016 and 2022.<sup>1</sup> According to this, doctoral scholarships would have to be increased immediately by this percentage - i.e. by €216. However, this would neither include price increases that have already become apparent this year, nor would it include expected future price increases. Furthermore, it must be considered that every increase in the scholarship rate also entails an increase in the contributions to statutory health and long-term care insurance for scholarship holders, which would - in any case - significantly reduce the additional amount available in actual terms by around 20%.<sup>2</sup> Therefore, in our view, an immediate increase in the scholarship rate by at least €300 is necessary.

### **Risk of Poverty**

In 2022, people living alone in Germany with a monthly net income of €1,250 were considered to be at risk of poverty.<sup>3</sup> Currently, doctoral scholarship holders receive a basic monthly scholarship of €1,350 (excluding the research allowance). Contributions to voluntary statutory health and long-term care insurance – which amount to an average of €272.70 per month – are usually deducted from this.<sup>4</sup> Although these contributions are subsidised by the scholarship foundations with €100 per month, the net amount available to doctoral scholarship holders in actual terms currently totals at €1,177.30, which is significantly below the poverty line for 2022.

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<sup>1</sup> Answer of the Federal Government to the minor interpellation by the CDU/CSU parliamentary group in the Bundestag, Printed Matter 20/7335: Begabtenstipendien und die gestiegenen Lebenshaltungskosten, available at: <https://dserver.bundestag.de/btd/20/075/2007560.pdf> [24.07.2023]

<sup>2</sup> The contribution to the statutory health insurance currently amounts to 14.6% plus an additional contribution, which averaged at 1.6% in 2023. The contribution to the statutory long-term care insurance is 4% (the latter applies to childless people; for people with children, the contribution to long-term care insurance is somewhat lower). All in all, the contributions to the statutory health and long-term care insurance total 20.2% on average. This means that the additional contribution available to the scholarship holders in real terms amounts to only €79.80 for an increase of €100, and only €172.37 for an increase of €216. Even the demanded increase of €300 would only lead to an additional amount of 239.40 € for the scholarship holders - if it is not accompanied by a complete reimbursement of the contributions to health and long-term care insurance.

<sup>3</sup> Federal Statistical Office, available at: <https://www.destatis.de/DE/Themen/Gesellschaft-Umwelt/Einkommen-Konsum-Lebensbedingungen/Lebensbedingungen-Armutsgefaehrdung/Tabellen/armutsschwelle-gefaehrdung-mz-silc.html> [24.07.2023]

<sup>4</sup> The contributions to the statutory health and long-term care insurance of an average of 20.2% (see footnote 2) result in €272.70 calculated on €1,350, and €292.90 calculated on €1,450.

Once scholarship rates are increased by €100 in October, the contributions to voluntary health and nursing care insurance will rise to an average of €292.90, so that doctoral scholarship holders will remain with a net amount of €1,257.10 per month from autumn onwards. This means that the increased scholarship rate will still place scholarship holders on the edge of the poverty line of 2022. It can be assumed that the poverty line has already moved upwards in 2023 and will continue to do so in the future. It should also be noted that due to the necessary association with a university, most doctoral scholarship holders live in larger cities where the poverty line is already significantly higher than in Germany as a whole.<sup>5</sup> Even after the planned increase of the scholarship rate from October onwards, many doctoral scholarship holders will still be acutely threatened by poverty.

### **Compulsory social insurance**

A critical reason for the precarious status of scholarship holders is the fact that the scholarship does not count as an income subject to social insurance. Compulsory contributions to health and long-term care insurance must be paid, while pension plans, insurance for prolonged illness or unemployment must be organised and financed individually. These conditions are not sustainable on a permanent basis, which is why the underlying structure of doctoral scholarships must be changed in the long term and transformed into an employment relationship subject to social insurance contributions. In order to counteract the further precarisation of doctoral scholarship holders, measures for acute social security must be taken. On the one hand, this concerns the full reimbursement of health and long-term care insurance contributions for all scholarship holders who do not have access to statutory health insurance. On the other hand, it is urgently necessary that the funding period of the doctorate be considered in the statutory pension insurance - and this independently of completed school, study and training periods, which must also be taken into account in full.

### **Scholarships for BA and MA students and The German Federal Training Assistance Act (BAföG)**

The scholarship rates of the foundations for the promotion of gifted students for Bachelor's and Master's studies have been increased twice since 2017, in 2019 and 2022, when the BAföG rates were raised by 5% and 5.75% respectively. Doctoral scholarship rates remained

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<sup>5</sup> In Munich, for example, the poverty line was already determined to be at net income of 1,540 € in 2021, see Munich Poverty Report 2022, available at: [https://www.muenchen.info/soz/pub/pdf/674\\_SOZ\\_Muenchner-Armutsbericht-2022\\_barrierefrei.pdf](https://www.muenchen.info/soz/pub/pdf/674_SOZ_Muenchner-Armutsbericht-2022_barrierefrei.pdf), p. 19 [10.08.2023]



unaffected. The planned increase in the scholarship rate for doctoral scholarship holders by 7.4% from October 2023 onwards falls well short of these increases.

### **Duration of scholarships**

Another major obstacle in the doctoral process is the funding period of scholarships, currently 2+1 years. This is now to be increased to 3+0.5 years from autumn onwards. However, this assumed maximum duration of obtaining a doctorate within three and a half years still does not come close to the actual duration of a doctorate. In Germany, this amounts to almost six years.<sup>6</sup> There have been sporadic reactions to this in academia. For example, the duration of a doctorate funded by the DFG [German Research Foundation] is 3+1 years, as recommended by the German Science and Humanities Council [*Wissenschaftsrat*].<sup>7</sup> This must also become standard practice for doctoral scholarships awarded by the foundations for the promotion of gifted students. Since the issue of insufficient lengths of scholarship periods affects all scholarship holders equally, it must be ensured that any extensions also apply to scholarship holders who are already receiving funding and that there are no differences in the regulations of the various scholarship foundations in this regard.

### **Equal opportunities**

The Federal Government's reply to the minor interpellation by the CDU/CSU parliamentary group in the Bundestag states that the promotion of gifted students strengthens equal opportunities in education.<sup>8</sup> In reality, under the current precarious conditions, one must be able to 'afford' a doctorate on the basis of a scholarship from the organisations for the promotion of gifted students. The planned increases, which are staggered over a period of three years, will hardly change this. As already described, doctoral scholarship holders continue to be threatened by poverty - both in present-day terms and in their old age. Financial reserves cannot be built up with the scholarship. As a result, people who do not have a financial safety net are structurally disadvantaged or excluded. When deciding for or against a doctoral scholarship under the current conditions, possible debts from Bachelor's and Master's degree programmes must also be considered as a serious factor. However, a

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<sup>6</sup> The average duration of a doctorate amounts to 5.7 years (excluding human medicine/health sciences), Bundesbericht Wissenschaftlicher Nachwuchs 2021, p. 30, available at: <https://www.buwin.de/dateien/buwin-2021.pdf> [17.05.2023]

<sup>7</sup> Position paper: Ausgestaltung der Promotion im deutschen Wissenschaftssystem, available at: [https://www.wissenschaftsrat.de/download/2023/1196-23.pdf?\\_\\_blob=publicationFile&v=15](https://www.wissenschaftsrat.de/download/2023/1196-23.pdf?__blob=publicationFile&v=15) [08.05.2023]

<sup>8</sup> Answer of the Federal Government to the minor interpellation of the CDU/CSU parliamentary group in the Bundestag, Printed Matter 20/7335: Begabtenstipendien und die gestiegenen Lebenshaltungskosten, available at: <https://dserver.bundestag.de/btd/20/075/2007560.pdf> [24.07.2023]

person's financial background should not be an obstacle to an application. Furthermore, it is imperative to prevent scholarship holders from being forced to prematurely abandon their doctorates due to a lack of a financial safety net and rising costs of living. Improving the conditions for doctoral studies is therefore indispensable for reasons of equal opportunities and educational justice.