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**REPORT FROM THE COMMISSION TO THE COUNCIL, THE EUROPEAN
PARLIAMENT, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND
THE COMMITTEE OF THE REGIONS**

**Report on the follow-up to the Recommendation of the European Parliament and the
Council of 10 July 2001 on mobility within the Community of students, persons
undergoing training, volunteers and teachers and trainers**

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1. INTRODUCTION

Transnational mobility in education, its enhancement and qualitative improvement, is playing an increasingly important role in the modernisation of education and training systems in Europe, which in turn is a key element of the strategy to achieve the wider objective set for Europe to become by 2010 the most competitive knowledge-based economy.

Building an effective European area of knowledge and learning, attractive for its citizens and the world, remains a big challenge. Transnational mobility for learning and teaching purposes is one of its main, if not its most concrete and productive expression, contributing to better employment and stronger cohesion in Europe, as well as to European citizenship.

Strong interest of policy makers as well as of stakeholders, combined with significant efforts deployed in most Member States and at European level, have led to progress in many respects. However, overall the situation has not improved enough: comprehensive strategies to facilitate and actively promote mobility are rather the exception than the norm, and results in many fields, including the removal of administrative and legal obstacles, fall short of what is actually needed.

This reflects in an exemplary way the Commission's concern as recently expressed in its Communication "Education & Training 2010: the success of the Lisbon strategy hinges on urgent reforms" providing a draft for the interim report on the contribution of education and training reforms to the Lisbon strategy¹. While acknowledging that efforts were "being made in all the European countries to adapt the education and training systems to the knowledge-driven society and economy", the Commission concluded that the reforms undertaken were "not up to the challenges and their current pace will not enable the Union to attain the objectives set". Much stronger and more co-ordinated efforts are needed to contribute to the objectives set for education and training systems, including accelerating and expanding the facilitation of mobility.

1.1. Objective of this report

The July 2001 Recommendation of the European Parliament and the Council on the mobility of students, persons undergoing training, volunteers and teachers and trainers² asked the Commission to report, based on national evaluative reports, on the implementation of the measures indicated in the Recommendation itself and those listed in the action plan for mobility (the "toolbox") endorsed by the Nice European Council in December 2000³. Reports were produced by all Member States, as well as by Norway, Iceland, Poland and Hungary. They provide information and comments on the efforts realised since 2001 – which are summarised in Section 2 below– as well as suggestions for further action, which served as a basis for Section 3.

¹ "Education & Training 2010 – the success of the Lisbon strategy hinges on urgent reforms", Draft joint interim report on the implementation of the detailed work programme on the follow-up of the objectives of education and training systems in Europe, Communication of the Commission, COM(2003)685 of 11 November 2003.

² OJ L 215 of 9.8.2001, p. 30.

³ Resolution of the Council and of the representatives of the governments of the Member States, meeting within the Council of 14 December 2000 concerning an action plan for mobility (2000/C 371/03), OJ C 371 of 123.12.2000, p. 4.

This report focuses primarily on actions taken in the last two years, specifically to implement the measures indicated in the Recommendation or in the Action Plan for Mobility. It also takes into account the wider strategy for education and training launched to implement the social and economic goals set in Lisbon as well as the measures and actions undertaken at national and European level to promote mobility for learning purposes. Conclusions on progress to date are being drawn, and proposals for further action presented.

1.2. Policy context

1.2.1. Mobility and European co-operation

Mobility has become a major part of European co-operation in education and training in particular since the launch of Community funded action programmes in the mid-1980s.

The resources from the Community budget earmarked for this purpose have grown steadily. For instance, the funds available for student mobility within the Erasmus programme passed from € 70 million in 1995 to € 102 million in 2002; mobility was funded within Leonardo da Vinci with € 44 million in 1995 and € 65 million in 2002; budget available for youth exchanges and mobility passed from € 19 million in 1995, within the Youth for Europe programme, to € 43 million in 2002, within the Youth programme (all amounts expressed in EUR-15 figures). This allowed increasingly large numbers of citizens to spend part of their education or training abroad. In particular, more than one million students have already benefited from the Erasmus programme.

An important earlier milestone was the Commission's Green Paper "Education – Training – Research: The Obstacles to Transnational Mobility" (1996) which analysed the situation seven years ago and recommended nine action lines. These dealt with statutory issues (for mobile trainees and volunteers, researchers, third country nationals), portability of grants and social protection, the reduction of obstacles (socioeconomic, linguistic and cultural as well as administrative) and the provision of information.

A politically important move was the opening up of existing mobility programmes to candidate countries well before their accession as full members of the EU.

1.2.2. The Lisbon strategy

European co-operation in education and training including mobility entered into a new phase with the Lisbon European Council of March 2000. The new strategic goal of the EU to become the leading knowledge-based economy and society in the world by 2010 was accompanied by the simultaneous acknowledgement that this will require significant changes in educational and social policies in the Union. The Lisbon European Council also raised the political profile of mobility on the Community agenda: its conclusion affirmed that mobility was an essential feature of the knowledge society and for the promotion of lifelong learning and stressed in particular the importance of fostering the mobility of students, teachers and training staff "through greater transparency in the recognition of periods of study and training, and through specific measures for removing obstacles to the mobility of teachers by 2002".

In the wake of the Lisbon conclusions, the Action Plan for mobility was endorsed by the Nice European Council of December 2000 and the Recommendation on mobility was adopted in July 2001. The European Council at its meetings in Stockholm in 2001 and in Barcelona in 2002 underlined the relevance of mobility for learning purposes in relation to labour mobility and the achievement of the Lisbon strategy.

The 2002 Barcelona European Council approved the “Work programme on the objectives of education and training systems in Europe”⁴ (“Education and Training 2010”). It identifies three strategic goals (quality, access and openness to the world) and 13 concrete objectives towards which the action of all countries involved should converge. Objective 3.4 of the work programme specifically addresses the issue of mobility and exchange and a Working Group comprised mainly of national experts was set up to examine the issue and to identify and work on priorities. When adopting “Education and Training 2010”, the Ministers of Education set ambitious goals relevant for mobility: by 2010 European education and training systems and institutions should have become a world reference for quality and relevance, there should be a sufficient level of compatibility between systems to allow citizens to take advantage of their diversity (rather than being constrained by it) and Europe should (again) be the preferred destination of students, scholars and researchers from other world regions. These goals were endorsed by the Barcelona European Council of March 2002. With them, two main new features were introduced in the Union's agenda: convergence of national policies towards the main European goals for education and training, and a greater attention paid to the role and attractiveness of European education in the world.

At the same time, an Action Plan for Skills and Mobility was launched by the Commission in 2002⁵. Its focus is the better functioning of the European labour market through concrete measures to facilitate occupational mobility, geographical mobility and information. A number of actions converge with the measures proposed by the 2001 Recommendation. In parallel with this report and ensuring complementarity the Commission is adopting a first report on the implementation of the Action Plan for Skills and Mobility.

Another specific line of action was started in 2002 on the basis of the Copenhagen Declaration of 30 November 2002⁶ and the Council Resolution of 19 December 2002 on the promotion of enhanced European co-operation in vocational education and training⁷. The need to remove obstacles to occupational and geographic mobility was indicated as one of the reasons for strengthening European co-operation. The proposed actions include measures to increase the transparency and recognition of competences and qualifications which build upon those called for by the 2001 mobility Recommendation (cf. § 2.3.3 below).

1.2.3. The Bologna process

The importance of mobility for “academic and cultural as well as political, social and economic reasons” was also highlighted by Ministers of Education at their meeting in Berlin in September 2003 in the framework of the Bologna process. Ministers stated their determination to improve such mobility, particularly in relation to the portability of grants, transparency tools and recognition issues⁸. The need to increase mobility in higher education, especially by improving the framework conditions within which it takes place and by

⁴ COM(2001)501 final.

⁵ Communication from the Commission, COM(2002)72 final of 13 February 2002; Council Resolution of 3 June 2002, OJ C 162, 6 July 2002, p. 1.

⁶ Declaration of the European Ministers of Vocational Education and Training, and the European Commission, convened in Copenhagen on 29 and 30 November 2002, on enhanced European cooperation in vocational education and training.

Cf. http://europa.eu.int/comm/education/copenhagen/index_en.html.

⁷ OJ C 13, 18 January 2003, p. 2.

⁸ Realising the European Higher Education Area, Communiqué of the Conference of Ministers responsible for higher education, Berlin, 19 September 2003.

enhancing Europe's attractiveness in the rest of world was also underlined in the Commission's Communication on "The role of universities in the Europe of knowledge"⁹.

1.2.4. Mobility and the European Research Area

In June 2001 the Commission adopted the Communication "A Mobility Strategy for the European Research Area"¹⁰ that aimed at creating a more favourable environment for transnational and intersectorial mobility of researchers throughout their career. The activities to be implemented include the removal of obstacles to mobility, the enhancement of information and practical assistance to researchers and further financial incentives to increase mobility. In its Resolution of 21 December 2001 the Council reaffirmed the importance of researchers' mobility in making a reality of the European Research Area¹¹. A first implementation report on activities was presented in February 2003¹²; a second implementation report is currently under preparation and will be presented in Spring 2004.

The importance and added value of mobility was also stressed in the Communication¹³ "Researchers in the ERA: one profession, multiple careers" adopted in July 2003 as well as in the Council Resolution¹⁴ on the profession and the career of researchers within the European Research Area (ERA) adopted in November 2003.

1.2.5. The Commission's proposal for the 2004 report on the implementation of "Education and Training 2010"

In November 2003 the Commission adopted a Communication on the implementation of "Education and Training 2010" which provides a draft for the interim report due to the Spring 2004 European Council. The Communication emphasises that the success of the Lisbon strategy hinges on urgent reforms, working simultaneously on four essential levers, i.e.¹⁵:

- To concentrate reforms and investment on the most crucial areas in each country, in view of the situation of each and of the common objectives;
- To define truly coherent and comprehensive lifelong learning strategies;
- To create, at last, a Europe of education and training, particularly by means of introducing a European framework of reference for qualifications in higher education and vocational training;
- To give "Education & Training 2010" its rightful place so that it becomes a more effective tool for formulating and following up national and Community policies.

1.3. Mobility - a key issue for Europe

More and better mobility is generally recognised as an important instrument for the modernisation of education and training systems. Transnational mobility for learning

⁹ COM(2003)58 of 5 February 2003.

¹⁰ COM(2001)331 final.

¹¹ Council Resolution concerning the reinforcement of the mobility strategy within the European Research Area (ERA), OJ C 367 of 21.12.2001, p. 1.

¹² SEC(2003) 146.

¹³ COM(2003)436 final of 18 July 2003

¹⁴ 2003/C 282/01

¹⁵ COM(2003)685, Section II: The four levers of success.

purposes contributes to extending the view of European citizens beyond national frontiers and cultures, preparing them for employment and active participation in a wider Europe, and to the internationalisation of European education and training systems. It is thus an important element of the strategy to achieve the 2010 economic and social goals.

Nevertheless, the numbers of persons in education and training systems participating in mobility are still very limited. In EU Member States the average share of students with foreign citizenship in tertiary education is 6.2%¹⁶. The percentage of tertiary education students coming from other EU/EEA countries as a percentage of all students is slightly above 2%. Differences between countries are important, but in only three countries is this share above 5%.

The number of people benefiting from Community support for a period of transnational mobility within their education or training, or in their capacity as teachers or trainers, has grown quickly since the start of Community funded mobility programmes. However, beneficiaries only make up a small share of the whole target population. For instance, the Erasmus programme has supported in 2002 the mobility of some 115 000 students, which means about 1% of the total yearly population of higher education students in Europe. Considering that higher education studies last on average 5 years, this rate means that approximately 5% of students benefit from a transnational mobility period in the framework of Erasmus. To reach the target rate of 10% participation specified in the Socrates decision, Erasmus mobility would have to more than double. The Leonardo da Vinci programme has supported in 2002 the mobility of some 45 000 trainees, which falls well short of 1% of persons participating in vocational education and training in Europe. The 5 500 mobility experiences (EUR-30) for training staff supported under Leonardo da Vinci in 2002 included trainers and language trainers as well as human resources managers and guidance staff. Within the framework of the Community programmes a very small number of school teachers (40 000 in 2003) and only a proportionally higher share of university teachers (16 000 in 2002) have undertaken a mobility activity. Such mobility periods are frequently of very short duration; the great majority of mobile school teachers, for example, typically take part in project meetings of only a few days at a partner school.

The relatively small number of mobile people in education and training is usually explained with reference to a number of 'obstacles' that hinder or even inhibit transnational mobility. The 1996 Green Paper aimed at identifying such obstacles and devised action lines to overcome them. In recent years, namely since the 2001 Recommendation and the Mobility Action Plan, the focus has been more often on actively promoting mobility. In fact, there is no clear boundary between actively promoting mobility and removing obstacles to it, and stressing the former rather than the latter is more a matter of presentation than of substance.

However if obstacles are understood in their stricter meaning, referring only to legal and administrative barriers, then some progress (e.g. as regards residence permits or portability of social security benefits) has certainly been achieved since 1996, both at national and at European level¹⁷. But this can not conceal the persistence of a number of such barriers, in

¹⁶ Students with foreign citizenship are, however, not necessarily mobile students. First, many tertiary students with foreign citizenship may have lived all their life in the country where they study. Secondly, a growing number of families live outside the country of which they are citizens; therefore students with home citizenship can now also be incoming and thus mobile students.

¹⁷ Relevant information can be found in the Communication on the implementation of the Action Plan for Skills and Mobility.

particular as regards social protection, taxation, and in particular recognition for academic and professional purposes of study periods and diplomas obtained abroad.

Promotion of mobility means marketing its benefits as well as providing adequate financial support and a good organisational framework, including language and cultural preparation. On all these points progress has taken place, as witnessed for example by the growth and qualitative improvement of the mobility strands in Community action programmes. However, the evidence above on the share of actually mobile persons in education and training clearly indicates that much more still has to be done. People have to be persuaded of the benefits of a learning related mobility experience, as well as of the advantages of such mobility for learning institutions, companies and society at large. Better preparation for mobility certainly can contribute to this purpose. However, responding to the growing demand for mobility is only meaningful in a context where supply can ensure that demand is satisfied to a reasonable extent.

Clearly the effective promotion of mobility cannot be done without taking into account all of these aspects. Addressing only a single aspect of strategy at a time, sector by sector, problem by problem, limits the effectiveness in extent and pace. The time has arrived for comprehensive and better co-ordinated approaches at national level supported by the European Union.

2. ANALYTICAL SUMMARY

This section of the report is divided into three parts. The first lists the main horizontal points emerging from the reports of national governments. The second, following the structure of the Recommendation, summarises measures taken at national or regional level in relation to all categories of people covered by the recommendation (2.2.1), students (2.2.2), persons undergoing training (2.2.3), volunteers (2.2.4) and teachers and trainers (2.2.5). It is based exclusively on the reports received from all Member States, as well as from Norway, Iceland, Poland and Hungary. It is an analytical summary, focusing on trends and common features of the varied national reports.

The third section informs on actions undertaken by the Commission to implement the recommendations addressed to it as well as on other related activities at European level.

2.1. Horizontal issues

All reports recognise the importance of mobility and the need for proactive policies in this respect. However, there are considerable differences between Member States concerning the degree of mobilisation leading to new measures for implementing such policies.

Only a few Member States have a defined national strategy for overall or sectoral mobility. Few countries, in addition, have comprehensive (cross-ministerial) co-ordination structures, which – while being compatible with decentralised as much as with centralised national systems – could contribute to a more efficient approach to mobility issues.

Community action programmes (Socrates, Leonardo da Vinci, Youth), play an important role everywhere. In some countries they coexist with other actions (bilateral schemes, national or regional initiatives, etc.), but in a number of countries they seem to be the only instrument for organised incoming and outgoing mobility.

Few reports specifically mention the issue of legal or administrative obstacles to mobility, such as those related to residence permits, social protection, and taxation. However, it should be noted here that most reports only cover new measures taken since 2001.

The suggestions for further action at European level are very heterogeneous; nonetheless some issues (portability of grants, improved statistical information, teachers' mobility) are proposed by several countries.

2.2. Progress reported at national level

2.2.1. Broad measures concerning all target groups of the Recommendation

Removing the **legal and administrative obstacles** to mobility (**Measure 1a** of the Recommendation) in the stricter sense is a horizontal issue. This, together with the lack of clarity about the term "obstacle" may to some extent explain why barrier removal was not given specific attention in most national reports, which chose to highlight proactive measures instead. In fact, progress on the removal of obstacles either as an issue in itself or with reference to particular measures was not at all or only marginally mentioned by most reports. For the category of students in higher education, this may reflect significant improvements. For other categories, (trainers, volunteers, teachers) conversely, lack of mention seems to indicate poor progress.

A variety of efforts have been made in all countries in the past two years towards reducing **linguistic and cultural obstacles** (**Measure 1.b**). Some of these have been linked to European initiatives (preparation for mobility experiences; award of the European label, use of the European Language Portfolio or the Common European Framework for Languages¹⁸). There is evidence of a trend towards the introduction of two foreign languages in school education (an established reality in some countries) and the learning of foreign languages in early years is also becoming more prevalent. In some countries institutions that satisfy certain linguistic criteria may qualify as "European schools". Teaching or training in a foreign language, while still relatively uncommon, is beginning to arouse increasing interest with the implementation of a growing number of pilot schemes.

Community programmes are the main mobility instrument initiatives in several countries, in terms of both the organisational framework and the financial support. Therefore topping up Community grants frequently occurs among actions undertaken in relation to financing mobility. Other such actions include a number of bilateral and regional initiatives, which in many cases already existed and which in the past two years have been expanded, improved or simply continued. Incoming mobility is also addressed in a few cases. In relation to the specific points made by the Recommendation (**Measure 1.c**), improved **portability of grants** is sometimes reported, but this is also raised as a controversial issue that needs to be tackled at European level.

In all countries efforts have been made to promote a **European qualification area** (**Measure 1.d**) through the implementation of Community transparency instruments. The use of the Europass-Training has gained ground in all Member States, and issuing the Diploma Supplement is becoming general practice. Work towards establishing Certificate Supplements is also being undertaken in all countries. This area is on the whole characterised by co-

¹⁸ Developed by the Council of Europe.

operation and common views on future developments between countries as well as between the national and European levels (cf. § 2.3.3).

Not many efforts have been reported concerning the extension to incoming mobile persons of the **benefits** available to resident counterparts (**Measure 1.e**). Some countries simply declare this to already be the case, so that no further action is deemed necessary. Some specific measures are mentioned, such as quotas in student dorms. With respect to **outgoing mobility** (**Measure 1.g**), specific new initiatives are not common; many countries refer to applying Council Regulation 1408/71¹⁹, several of them note that financial aid schemes also apply to mobile learners. Some improvements have been indicated in relation to **third country nationals** (**Measure 1.h**), particularly in terms of simplified admission procedures and specific financial help.

Information and guidance for potentially mobile persons – on learning opportunities, recognition of qualifications and practical issues – (**Measure 1.f**) is available throughout Europe and is supported by many initiatives, usually related to European networks such as Euroguidance or NARIC. Internet portals now usually accompany more traditional means. For the past two years, most countries report extensions of and improvements to existing initiatives rather than the creation of new measures.

2.2.2. Some real improvements for students

An increasing use of **ECTS** to facilitate recognition for academic purposes at home (Measure 2.a) was reported and is on the way to becoming general practice. In all countries ECTS is used to facilitate Erasmus mobility, and the majority of countries have introduced or are developing national credit systems that are compatible with or equivalent to ECTS. A few countries have indeed adopted ECTS as their national credit system. National information campaigns to promote the use of ECTS are also carried out in several countries.

The issue of other measures aimed at improving the **framework for academic recognition** (Measure 2.b) was raised by several countries, but often only to stress the autonomy of higher education institutions, rather than to indicate actual advancements. Recognition issues both for foreign students and for students returning home from a period abroad are usually the subject of individual decisions by universities, normally with an appeal procedure available to students. However, some countries have established a national agency that provides assistance to universities on recognition matters and can also play an advisory role to national authorities.

The use of the **Diploma supplement** to facilitate recognition (**Measure 2.c**) is increasing and finds wide political support, as confirmed by the 2003 Berlin ministerial meeting, which set the objective that all students graduating as from 2005 should receive the Diploma Supplement automatically and free of charge, issued in a widely spoken European language²⁰. Some countries have introduced legislation to make it mandatory for universities to issue a Diploma Supplement along with the degree certificate – an option being considered by several other countries. Others prefer to recommend and encourage the use of the Diploma

¹⁹ Regulation (EEC) No 1408/71 of the Council of 14 June 1971 on the application of social security schemes to employed persons and their families moving within the Community, OJ L 149 of 5.7.1971, p.2.

²⁰ Communiqué of the Conference of European Ministers on “Realising the European Higher Education Area”, held in Berlin in September 2003.
Cf. http://www.bologna-berlin2003.de/en/communiqué_minister/index.htm.

Supplement. In many countries the model of Diploma Supplement developed at European level has been slightly adapted for better use in the national contexts.

A wide variety of initiatives have been taken to **promote mobility among students and pupils (Measure 2.d)**. They include in particular new legislation by national authorities, related to financial aspects (portable grants, top-up schemes), as well as to wider framework conditions: offering courses in foreign languages, fostering and facilitating joint degrees, facilitating practical placements in another country. Non- legislative measures initiated include the provision of practical assistance, information and guidance by learning institutions or by national agencies using European programmes.

Equally varied are the actions taken in order to **integrate students** into the host education system (**Measure 2.f**). In many cases this means that practical assistance/services (in particular related to accommodation) is provided by education institutions, without a reference to wider policy measures. The simplification of procedures for incoming students is more rarely mentioned. However, several countries observe that their education systems are already highly multicultural and integration does not seem to be a problem. Specific attention to the reintegration in the home institution after the study period abroad is on the other hand rarely reported, and usually refers to the use of European schemes for recognition and transparency.

While a few countries indicate that incoming students have free use of national health insurance systems, it does not seem that specific action has been taken recently to make it easier for students to prove that they have **health cover or insurance (Measure 2.e)**.

2.2.3. Mobility of persons undergoing training is still lagging behind

The use of **Europass-Training**, which is implemented in all Member States, is often quoted as the only action taken to increase the status in the home country of a mobility experience abroad within vocational education and training (**Measure 3.a**). A few other measures are mentioned, typically in relation to specific bilateral or regional mobility schemes, but also including an example of document specifically created to record training experiences abroad.

Improving the **transparency of vocational qualifications (Measure 3.b)** is naturally seen as an issue for European co-operation. Most measures reported concern in fact the preparation of the Certificate Supplement (or a slightly adapted equivalent national instrument) and the gradual establishment of national reference points for vocational qualifications. This can be considered as proof of converging views and of successful co-operation between the different countries and between the national and the European level.

The impact of mobility on the **social protection** of persons undergoing training (**Measure 3.c**) is less clear. Some countries point out that the status of such persons can vary (employed workers, unpaid students, etc.) and that therefore their social security coverage varies. With reference to **Measure 3.d** (making it easier for persons undergoing training abroad to prove that they have sufficient resources), it should be said that following Directive 93/96/EEC persons undergoing training abroad simply need to declare that they have sufficient resources, without needing to prove it.

2.2.4. Mobility of volunteers: a bottleneck to overcome

The advantages and benefits of voluntary work are generally appreciated and valued, and some countries have a long tradition of volunteering, but the specific **status of volunteers** is

still lacking recognition in national legal and administrative frameworks (**Measure 4.a**). Volunteering still mostly remains an informal activity with an unclear status and is often differently perceived in the various countries. The lack of an internationally approved definition and recognition of volunteering present restrictions and practical difficulties in obtaining visas and residence permits, seriously hampering the mobility of volunteers.

In a number of countries, voluntary work is treated as **equivalent to employment** (in contradiction to **Measure 4.d**), especially in the case of long-term volunteering, and therefore subjected to the same regulations, mainly taxation, because pocket money and other benefits such as free board and lodging are considered as income. In some countries volunteers need an employment permit. On the other hand, where volunteers are considered as being in employment, this entitles them in principle to social security benefits.

Volunteering at European level is mainly through the European Voluntary Service (EVS), within the framework of the YOUTH programme, whose basic legal act also calls for the removal of obstacles to mobility. The EVS has played a major role in promoting the concept of volunteering, and especially the mobility of volunteers, in many Member States where volunteering is considered mainly as a charitable action.

Volunteers within EVS receive a certificate at the end of their period of volunteering (not recognised as a formal qualification). This seems to be the only case of **certification of voluntary activity** abroad (**Measure 4.b**); in one country the EVS certificate has been the basis of a more complete skill record, for which official accreditation is being sought.

Equally, it is only in the case of EVS that volunteers are automatically insured (by the Commission) when undertaking a period of volunteering abroad (**Measure 4.c**). The situation of mobile volunteers in relation to **insurance and social benefits** is rarely mentioned without reference to EVS.

2.2.5. Mobility of teachers and trainers: a crucial weakness

Very little specific action seems to have been taken in relation to **short-term mobility** of teachers and trainers (**measure 5.a**). The Recommendation specifically asked to take this issue into account and to encourage co-operation, so that educational staff and their institutions could be offered a framework to develop appropriate responses. While some countries point out that responsibility in this area rests with individual institutions in their capacity as employers of teachers and trainers, there is a general absence of framework policies supporting short-term mobility of staff and enabling institutions to encourage it.

The national reports highlight some cases where a national strategy on mobility exists. In other cases it is clear that the initiatives are regional or local reflecting the levels of responsibility in particular countries. Such initiatives need more encouragement and should be generalised.

There are also some exchange schemes organised at a bilateral level between countries or regions as well as some measures aimed at better recognition of experiences abroad. There is very little evidence of initiatives to facilitate incoming teachers and trainers, other than the opportunity to teach in languages other than the national language sometimes offered to higher education professors. It should be noted that measures introduced in some Member States allowing access to teachers trained in other countries, often arise from efforts to address issues of teacher shortage, rather than concerted policies to encourage mobility between systems of school education in order to increase its European dimension.

Most of these initiatives also contribute to the introduction of a **European dimension** in the working environment of teachers and trainers (**measure 5.c**). However while there are some initiatives in relation to new qualifications with an intercultural orientation and the addition of an international element to existing programmes, there is little evidence of the inclusion of a European dimension in the initial or in-service training of teachers provided at national level. Although, exchanges are perceived as the most effective way to contribute to making teaching and training more European they are far from generalised within systems and involve only limited numbers of educational staff. Significant further work is necessary within the teacher education and schools sector if participation in exchanges, and periods of mobility in other European countries are to be recognised and accredited as important components of the teacher's career.

Within the higher education sector, **mobility as a standard part of a teacher's career** (**measure 5.d**) is mentioned by some countries. This is however largely limited to the career of university teaching staff. Noteworthy is the absence of any reports of the existence of examples that link periods spent on teaching exchanges or other types of mobility to career development.

2.3. Progress at European level

In the last two years the Commission has undertaken several actions aimed at implementing the specific requests addressed to it by the Recommendation and at taking up the proposals of the Action Plan.

2.3.1. Co-operation

A specific **Working Group** dealing with mobility has been set up with a double mandate: it acts as the **group of experts on mobility** responsible for monitoring the implementation of the 2001 Recommendation and at the same time as the working group contributing to objectives 3.4 (**Mobility**) and 3.5 (**European co-operation**) of the "Education and Training 2010" work programme. A first report on its activity has been produced²¹.

2.3.2. Information and guidance

As concerns the provision of information and guidance on learning opportunities, the main achievement is the **Ploteus Internet portal**, launched in March 2003²². Ploteus provides citizens with information about learning opportunities throughout Europe, about the structure of education and training systems, on opportunities for exchanges and on other issues related to mobility for learning purposes. The information content is largely provided by the Euroguidance network. Ploteus is also part of the European Job Mobility Portal, the European labour market information system that was launched in September 2003²³. The current Ploteus portal, which now is consulted on average 1500 times daily, is only the first step, to be followed by a service which will offer citizens direct access to information on learning opportunities, by making national services inter-operable throughout Europe. After discussion with the competent national authorities, a tender has been launched and the development work will start early in 2004.

²¹ Cf. http://europa.eu.int/comm/education/policies/2010/doc/mobility_en.pdf.

²² Cf. <http://www.ploteus.net>.

²³ Cf. <http://europa.eu.int/eures>.

2.3.3. *Transparency of qualifications and competences in VET and higher education*

Transparency of qualifications and competences has proven to be a rich area for progress through European co-operation. In higher education, the use of **ECTS** and the **Diploma Supplement** is becoming general practice and the Commission has been actively promoting and supporting the various strands of the Bologna process. In 2004 the Commission will award ECTS Labels to institutions which apply ECTS in all first and second cycle degree programmes. In VET, transparency instruments have been boosted by the Copenhagen declaration.

The work of the European Forum on the transparency of vocational qualifications has resulted in an agreement on a common structure for a **certificate supplement**. Such documents, which explain what a certain qualification means in terms of competences and with reference to the training system to which it belongs, are now being developed in all Member States following a common template²⁴. In order to provide citizens and operators with a contact point for all issues concerning qualifications, **National Reference Points for Vocational Qualifications** (NRP) have been or are being set up in all Member States²⁵. These achievements implement in particular **measures III.e and 2.b** of the Recommendation.

The **European common format for Curriculum Vitae**, specifically called for by the Conclusions of the 2000 Lisbon Council²⁶, was defined in a Commission Recommendation in March 2003²⁷. Since then it is available on paper as well as on the Internet, particularly on the website of Cedefop (from where more than 500 000 CVs had been downloaded until September 2003) and within the European Job Mobility Portal²⁸.

In the wake of the above mentioned Copenhagen Declaration, the Commission adopted on 17 December 2003 a proposal for a Decision on a **single framework for the transparency of qualifications and competences (Europass)**²⁹, which aims at rationalising the existing transparency instruments and the related implementation bodies and support networks, implementing in particular **Measure III.e** of the Recommendation. The Europass is organised around the European CV and includes the MobiliPass (which replaces the Europass-Training), the Diploma Supplement, the Certificate Supplement and the European Language Portfolio. The **MobiliPass** will allow citizens to record experiences of transnational mobility in education and training at any level. Further documents may be added in future, to allow in particular for a closer focus on specific sectors or skills.

2.3.4. *The European Year of Languages and the Language Action Plan*

When the **European Year of Languages** was launched in 2001 the political objective was already clear: all those leaving compulsory education should be able to communicate in at least two European languages in addition to their mother tongue and then be able to build on that knowledge for the rest of their lives. The wider aim of the European Year of Languages 2001 was to encourage lifelong language learning through stressing the cultural, educational, economic and personal benefits of learning languages. Throughout that year language policy

²⁴ Cf. <http://www.cedefop.eu.int/transparency/certsupp.asp>.

²⁵ Cf. <http://www.cedefop.gr/transparency/refpoint.asp>.

²⁶ Conclusion 26. Cf. <http://ue.eu.int/fr/Info/eurocouncil/index.htm>.

²⁷ Commission Recommendation of 11 March 2002 on a common European format for curricula vitae (CVs), C(2002) 516, OJ L 79 of 22.3.2002 p. 66.

²⁸ Cf. <http://www.cedefop.eu.int/transparency/cv.asp> or <http://europa.eu.int/eures>.

²⁹ COM(2003)796 final.

issues were undeniably brought under closer public scrutiny. The impact of the year was particularly strong amongst professionals (teachers and students) and policy makers, leading to a number of significant political developments.

In the light of the success of the European Year of Languages, a European Parliament Resolution of 13 December 2001 called for measures to promote **language learning and linguistic diversity**. The Education Council on 14 February 2002 invited Member States to take concrete steps and invited the European Commission to draw up proposals in these fields. The European Commission has responded to that request by drawing up a Language Action Plan, which was adopted by the Commission on 24 July 2003³⁰.

The **Language Action Plan** sets out the context and the main policy objectives to be pursued within three broad areas: extending the benefits of life-long language learning to all citizens, improving language teaching, and creating a more language-friendly environment. It contains concrete proposals for a series of actions to be taken at European level with the aim of supporting actions taken by local, regional and national authorities. These actions use resources available in existing community programmes and activities. In 2007 the Commission will review the actions taken at all levels and report to the European Parliament and Council.

2.3.5. *Community mobility programmes*

The **quality of mobility** projects has been introduced as a priority under the **Leonardo da Vinci** programme, through the call for proposals 2003-2004. Preference is given to projects which emphasise the linguistic and cultural preparation, provide clear indications on objectives, content and duration of mobility periods, as well as on teaching, mentoring and sponsorship, and look for validation of skills and competencies acquired during the mobility period. A “mobility quality action plan”, including i.a. the creation of a Leonardo da Vinci “Partnership Charter”, is currently being prepared with a view to the call 2005-2006.

The **Erasmus University Charter** and the Erasmus Student Charter have been introduced in 2003, to enhance the quality of organisational arrangements for the mobility of students. The first, which confers the right to participate in Erasmus, is only awarded to higher education institutions that commit themselves to the fundamental principles of Erasmus and to a set of quality terms and conditions. The Erasmus Student Charter contains information on the rights and responsibilities of the students, specifically mentioning among others their entitlement to free tuition and to the recognition of their studies abroad.

In the year 2000-2001 management of the funds for **Erasmus teaching staff mobility** was entrusted to National Agencies and made less demanding in terms of application requirements. The significant and steady increase of teaching staff mobility numbers observed in most countries in the last three years shows the benefits of such change.

2.3.6. *A study on a “Mobility Card”*

Further to the recommendation of the Group of Experts on Mobility, a feasibility study on a '**Mobility Card**' will be launched by the Commission in April 2004 and should result in a report by the end of summer 2004. The purpose of the feasibility study will be to review, prior to any further decision, the currently existing youth mobility cards and of the facilities and benefits they confer to their holders throughout Europe.

³⁰ COM(2003)449 final.

3. STRIVING FORWARD

3.1. An integrated approach for mobility in education and training in the Lisbon strategy

The Commission's Communication "Education and Training 2010: the success of the Lisbon strategy hinges on urgent reforms" has stressed the conditions for education and training systems to play their full part in achieving the objectives of the Lisbon strategy. It has clearly defined the areas where urgent reforms are needed and has proposed to establish by 2006 a fully integrated approach, encompassing all education and training policy actions at European level, including the promotion of mobility. The suggested reporting would also become fully comprehensive, thus replacing the various (however often interlinked) national reports dealing with specific strands relevant to education and training. It thus seems appropriate to henceforth pursue all future activities, be they follow-up measures or new ones, under this perspective of integration.

The following suggestions for further action to implement the Mobility Recommendation and Action Plan come either directly from Member States and participating EEA countries or are based on the analysis of their reports. To a very large extent they match those proposed in the above mentioned Communication.

3.2. Improving the context for mobility

3.2.1. *Setting targets and monitoring mobility flows*

- Within their reform policies defined in order to implement the Lisbon strategy, Member States should set ambitious **targets** for outgoing and incoming mobility, with a fixed timetable, ensure effective overall co-ordination and regularly monitor and report on their achievement. Quantitative targets should also be set, as appropriate, for instance expressed as percentages.
- Effective setting of targets and monitoring of progress requires reliable information. The Commission and the Member States will co-operate to develop compatible **statistical information** on mobility including data on flows and trends as well as mobility indicators compatible with national and Community level statistical collection systems.

3.2.2. *Reviewing legislation*

- Member States should review systematically overall and sector-wise national legislation and practices to eliminate the persisting legal and administrative obstacles to mobility, in particular as concerns people undergoing training, teachers and trainers and volunteers (cf. § 3.3 below).
- A clearer status for volunteers: in its White Paper "A New Impetus for European Youth"³¹ the Commission identified voluntary activities of young people as priority. This priority is treated by the open method of co-ordination, within the framework of which the Commission sent a questionnaire on voluntary activities to the current and future Member States with the aim of proposing common objectives to the Council. The Commission is aware that the status of volunteering is lacking recognition. Nevertheless, traditions and practices when it comes to voluntary activities vary considerably in the different Member

³¹ COM(2001)681.

States. Therefore, when defining common objectives, the Commission and the Council should reflect on how to ensure the legal and social protection of young volunteers.

3.2.3. *Opening up to incoming mobility*

- The Commission has announced its intention to develop by 2005, in co-operation with Member States, a European framework of reference for qualifications³². Besides fostering internal mobility and allowing students to better take advantage of courses offered anywhere in the Union, this will increase the **readability of European qualifications** seen from abroad.
- A **European marketing strategy** should be developed to ensure better world-wide promotion of European education and training learning opportunities.

3.2.4. *Financing mobility*

- The call for substantially increased investments in human resources, issued by the Lisbon European Council, also clearly applies to mobility for learning purposes, which contributes to the quality of education and training systems. Defining measures to actively promote investment in knowledge³³, Member States should take into account the need for **funding mobility beyond Community funded programmes**, which in some countries seem to be the only existing scheme.
- Some Member States are hesitant about extending complete portability to national grant and/or loan schemes (i.e., enabling students to use their grants/loans while studying abroad), since they fear that in so doing, they may incur the obligation, on the basis of Community law, to provide portable grants/loans to all EU citizens having studied for a shorter or longer period in their country. The Commission believes it would be useful for the respective roles of home and host countries for financing student mobility abroad to be further examined at European level.

3.2.5. *Preparing mobility*

Resources for educational mobility have to be used in the most effective way, and this implies in particular an adequate preparation of mobility experiences, to be pursued in co-operation by sending and host countries/organisations to an extent appropriate to the duration of the experience.

- What makes a good quality experience has to be defined in operational terms. The Commission and the Member States will develop by the end of 2004 a European **quality charter for mobility**. This should define a common European set of principles, to be implemented on a voluntary basis, offering the opportunity to build mutual trust between all parties and providing Member States with a European context for defining their own policies³⁴.
- One of the quality criteria will concern **linguistic preparation**. This is clearly a field where considerable progress can be achieved in both sending and host countries. More

³² COM(2003)685, § 2.3.1.

³³ Cf. COM(2003)685, § 2.1.2.

³⁴ COM(2003)685, § 2.2.3.

systematic preparation before departure should be complemented by initiatives in the host country when the duration of the mobility experiences justifies it.

- Persons receiving mobility grants under the Socrates and Leonardo da Vinci programmes are able to receive funding for training in the language of the host country before their learning period abroad. The Commission, through its Action Plan for Languages, will encourage a greater degree of take-up of this possibility.

3.2.6. *Recognising mobility*

- Lacking or uncertain recognition of a learning period abroad, including in particular any qualification obtained, discourages mobile and potentially mobile citizens. Much work remains to be done at legal level, and Member States are asked to specifically **identify all persisting recognition problems** in the framework of the review of legislation recommended above in § 3.2.2.
- As part of the action towards achieving the 2010 education and training objectives, the Commission and Member states should make all necessary efforts to establish a “common framework” for the development of quality assurance and a credit transfer system in vocational training³⁵. Work should continue on a **credit transfer system** along the lines of ECTS for all levels of education and for vocational education and training (within the follow-up to the Copenhagen Declaration), and on the creation of a platform for **quality assurance** or accreditation in higher education (in conjunction with the Bologna process).
- Member States are also asked to contribute to the rapid adoption, and to prepare for an adequate implementation, of the proposal for a decision on a single framework for the transparency of qualification and competences (the new **Europass**) mentioned above in § 2.3.3.

3.2.7. *Increasing the mobility for language learning and teaching*

A number of the measures set out in the Commission's Action Plan for Languages 2004-2006 relate to increasing the mobility of both language learners and language teachers.

The Commission services and National Agencies shall undertake targeted campaigns to disseminate **information** about the Socrates and Leonardo da Vinci programmes' mobility schemes for **language teachers and their trainers**, with a view to increasing take-up of these actions. Increased take-up of the **Language Assistantship action** will also be encouraged, in particular to support language teaching at primary level. The Commission also intends to encourage extended **exchanges of teachers** between partner schools wishing to introduce a Content and Language Integrated Learning approach. The Socrates programme's Arion mobility scheme will support **study visits by language inspectors**.

A slight increase has been observed in the number of foreign languages learned per pupil in secondary education, the figure having risen from 1.2 foreign languages per pupil at the start of the 1990s to an average of 1.5 in 2000. Nevertheless, this result is still well short of the objective set by the Barcelona European Council 2002. If the target figure of at least 2 foreign languages per pupil/student is to be guaranteed, there remains much work to be done.

³⁵ COM(2003)685, § 2.3.1.

3.3. Two priority target groups

3.3.1. Mobility to increase the quality and the attractiveness of the profession of teacher/trainer

Mobility adds to the attractiveness of the teaching profession, enhances the quality of the work of teachers and trainers, and contributes to a positive attitude towards mobility among their students, pupils and trainees. Mobility of education staff is also a major factor in consolidating the European dimension of education. Therefore, in defining and putting in place by 2005 their action plan on continuing training for educational and training staff³⁶, Member States should clearly recognise mobility as an integral part of the career development of teachers and trainers and take all necessary measures to ensure its promotion and implementation³⁷.

At European and national level, efforts are necessary to diversify the opportunities for mobility offered to educational and training staff: from participation in seminars to placements in industry and to longer periods of exchanges.

3.3.2. Increasing mobility in vocational education and training

It is necessary to significantly increase the number of persons who benefit from a mobility experience within their vocational education and training. The Commission will continue to work towards improved quality assurance for the mobility actions within the Leonardo da Vinci programme (cf. § 1.1.2 above); within the framework of the new generation of programmes, it will propose a further expansion of such actions. However, adequate efforts must be deployed in all Member States, so that further opportunities are available over and above Community-funded action. All stakeholders should be involved to define ways to increase the resources, improve the organisational framework and raise the attractiveness of mobility. In particular, the needs of SMEs both as sending and host bodies should be addressed. To this purpose, the Commission and Member States should co-operate to reduce the administrative burden put on sending and host bodies and to develop incentives for SMEs and their staff to participate in mobility schemes.

3.4. Reporting

All policies and reforms contributing to the shared objectives set out in "Education and Training 2010" need to be integrated into a single, comprehensive approach. Given the crucial importance of education and training for the Europe of knowledge, this is important not only for the attainment of these educational objectives, but indeed for the success of the Lisbon strategy as a whole. Mobility, as a fundamental dimension of the European Union and a core constituent of its education and training agenda, has of course to be included in this integrated approach.

In its Communication concerning the draft interim report on "Education and Training 2010" due to the Spring 2004 European Council, the Commission called for the consolidation of all specific reports dealing with education and training required from Member States into a single one. The 2001 Recommendation on mobility provided for national evaluative reports to be submitted to the Commission every two years. The Commission recommends that in future years no separate reports on the implementation of the recommendation on mobility should be

³⁶ As proposed in COM(2003)685, § 2.1.3.

³⁷ COM(2003)685, § 2.3.2.

requested from Member States; rather, quantitative and qualitative progress made by Member States with respect to mobility should be included in their comprehensive reports, an analytical summary of which will be submitted by the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of Regions.