



EUROPEAN COMMISSION
Directorate-General for Education and Culture

**IMPLEMENTATION OF
“EDUCATION & TRAINING 2010”
WORK PROGRAMME**

**WORKING GROUP F
“MOBILITY AND EUROPEAN COOPERATION”**

**DRAFT QUALITY CHARTER FOR MOBILITY
IN EDUCATION AND TRAINING**

Draft Quality Charter for Mobility in Education and Training

1. Introduction

The Mobility Action Plan endorsed by the 2000 Nice Council and the Recommendation of the European Parliament and the Council of 10 July 2001¹ gave the impetus for a series of measures to be taken by the Member States and the Commission.

The “Work programme on the objectives of education and training systems in Europe” (“Education and Training 2010”)² approved by the 2002 Barcelona European Council included the objective of increasing European mobility and exchanges for education and training purposes.

The “Joint intermediate report of the Council and the Commission “Education and Training 2010 - The success of the Lisbon strategy hinges on urgent reforms”³ of 26 February 2004 stresses that the level and quality of mobility in the area of education and training need to be increased.

The Report of the Commission on the follow-up of the 2001 Recommendation⁴ summarises the progress accomplished since 2001 and contains a number of recommendation to improve the context for mobility, namely including the following:

"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 policies".

The benefits derived from a mobility period are very much dependent on the quality of the practical arrangements: preparation, learning environment, monitoring, support, recognition. Educational mobility should be a useful learning experience. Both the individual and the organisations involved can greatly enhance its value by proper planning, implementation and evaluation.

The Charter presented here consists of a common set of principles to be applied to periods of mobility abroad for purposes of learning. Its aim is to offer an instrument that facilitates design and implementation of mobility policies and programmes. It is meant to be a reference document containing a set of guidelines that should be used according to the needs when developing and implementing mobility actions.

The Charter should be used on a voluntary basis; it is not intended to introduce binding rules, nor to add bureaucratic complexities which might hinder the promotion of transnational mobility.

In the context of the growing mobility and exchanges and the recognition of educational periods spent in other countries, the Charter can help to build mutual trust between public authorities, organisations and all parties involved in mobility.

¹ 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 12.12.2000, p. 4.

Recommendation of the European Parliament and the Council of 10 July 2001 on the mobility of students, persons undergoing training, volunteers and teachers and trainers, OJ L 215 of 9.8.2001, p. 30.

² COM(2001)501 final.

³ OJ C104/1 of 30 April 2004.

⁴ COM(2004)21 final of 23 January 2004.

The Charter is “universal” in the sense that it covers all possible types of mobility for learning purposes: formal, informal and non-formal learning, short and long periods, school-based and on-the-job learning, for young and adult learners, etc. Therefore, the implementation of the principles of this Charter will have to be modulated according to circumstances, i.e. to be adapted to the concrete situation addressed by the specific programmes and policies. In certain cases, some of the points of the Charter will be less relevant and can be given secondary importance while other points will be crucial and will need to be elaborated in much more detail. Moreover, some points may be made compulsory and strictly enforceable while others may be considered as options. Thus, the text of the Charter offers a reference or a template to be tailored to the particular programme or action⁵.

⁵ By its "universal" nature, the text of the Charter inevitably is rather generic and sometimes choices had to be made on the terms used. It is not possible, with a limited choice of words, to cover all possible cases, particular situations, exceptions, etc. Otherwise the text would become extremely complex and long. It is understood that when applied to a particular programme of activity, other terms may have to be used.

2. The Charter

- (1) *Training/study plan.* For every stay abroad undertaken for a learning purpose a learning plan should be elaborated beforehand and agreed by all parties: sending institution, hosting organisation and the participant. This agreement should enumerate the learning aims and expected outcomes and indicate how these will be reached.
- (2) *Enhancement of the participant's line of study or occupation.* The learning experience abroad should be designed in such a way that it becomes an integral part of the participants' educational pathway, both in terms of matching with his/her previous education and of recognising its results for the future.
- (3) *Recognition and transparency.* If a study or placement period abroad takes place as an integral part of a formal study or training programme, the stay should be recognised as a part of this on the basis of a set of transparent criteria that have been agreed beforehand. For other stays and in particular stays undertaken in the context of non-formal or informal education and training, a certificate should be issued so that the participant is able to record his or her participation or learning outcomes in a satisfactory and credible way.
- (4) *Preparation.* Preparation should, in principle, encompass linguistic, cultural, practical, pedagogical and personal aspects, including in certain cases (e.g. for disadvantaged groups) motivation.
- (5) *Linguistic preparation and assistance.* Participants should be given the opportunity to become acquainted with, or to increase their knowledge, of the language of the host country. Where appropriate, this should include language assessment and language learning prior to departure as well as linguistic support in the host country.
- (6) *Role of the mentor.* A mentor should be appointed at the hosting organisation (educational establishment, enterprise, etc.) whose task it is to ensure the proper integration of the participant into the host environment and to act as a contact and support person in the event of difficulties.
- (7) *Adequate logistical assistance.* Adequate logistical assistance in the shape of information and practical assistance with travel arrangements, insurance, residence and/or working permits, social security, accommodation etc. should be provided.
- (8) *Debriefing and evaluation.* Upon return to the home country, participants should have access to guidance to capitalise on competences and skills acquired during the stay. The stay should be properly evaluated and it should be ascertained whether the aims of the training/study agreement have been met.
- (9) *Assistance with re-integration.* Participants in long-term mobility activities should receive adequate assistance with the re-integration into the social, educational or professional environment of the home country.
- (10) *Clear definition of commitments and responsibilities.* The responsibilities arising from the above quality criteria should be clearly defined and communicated to all involved parties – including participants - in order to ensure a correct and smooth implementation of the project. The allocation of responsibilities should be indicated in written documents, possibly contracts, signed by the concerned parties.

Annex to the Draft Quality Charter for Mobility in Education and Training

Examples of good practice relevant to the Charter

The following examples of good practice have been attached to add a practical dimension to the definition of the criteria that make up the quality charter. They have been culled from a large number of possible activities with a view both to illustrating individual criteria and to demonstrating the diversity of transnational mobility project and programmes across Europe. For each of the criteria in the charter, an activity has been selected to illustrate how this aspect has been addressed here. Many of the activities could easily serve as examples of good practice for more than one criterion, but for the sake of coherence in the document, the description has focused on one aspect only.

(1) Training/study plan

The Danish PIU-programme gives people in initial vocational training the right and the possibility to spend part or all of their mandatory work placement in another European country. The programme was set up in 1992, and is now an integral part of the internationalisation strategy for education and training in Denmark, with app. 1100 participants per year, who spend an average of 8 months abroad. During these placements, they are paid the relevant apprentice wage of the host country by the hosting employer, but extra costs are financed by the Employers Reimbursement Scheme (AER) a fund made up of payments from Danish employers, and run by the social partners.

It is a condition for participation in the programme that the prospective participant has obtained the permission of the trade committee prior to departure. The trade committees are responsible for curriculum development and recognition/certification, and are run by the social partners. For this purpose, he or she will need a detailed training plan for the period he/she intends to stay abroad. In order to standardize procedures, the trade committees have made detailed descriptions of all the practical tasks, which an apprentice within a particular trade must learn as part of his course. The hosting company must then, on the basis of these descriptions, put together a detailed training plan for the participant, indicating for which skills they can offer training, and whether they can do so fully or only in part. This training plan is given a provisional approval by the trade committee, who will then issue a final approval when the participant returns with the aims fulfilled. Besides being an instrument for recognition, the training plan is also a vital communication instrument between all stakeholders involved concerning learning in the placement.

(2) Enhancement of the participant's line of study or occupation

The Greek EPEAEK programme (the abbreviation stands for *Operational Plan for education and initial Vocational Training*) ran in the years 1996-2000. It was a framework programme for the development of human resources in education and training, and contained a specific action line called "mobility programmes" that concerned students and teachers from general and vocational secondary education and training. The aim of the programme was to provide teachers and students with possibilities for education and training that were not available in their home institution or region; either elsewhere in Greece or in other European countries. The mobility projects undertaken in the context of the programme could either happen in the shape of school stays or as placements in companies, but it was emphasised that the stays were to complement and/or supplement the line of study or training of the students. Further aims were foreign language proficiency, the acquisition of intercultural skills, and personal development.

(3) Recognition and transparency

1. The European Credit Transfer and Accumulation System (ECTS) was introduced in 1989, within the framework of Erasmus as a student-centred system based on the student workload required to achieve the objectives of a programme. ECTS is the only credit system which has been successfully tested and used across Europe. ECTS makes study programmes easy to read and compare for all students, local and foreign. The system facilitated the recognition of periods of study abroad and thus enhanced the quality and volume of student mobility in Europe.

ECTS is developing into an accumulation system to be implemented at institutional, regional, national and European level. This is one of the key objectives of the Bologna Declaration of June 1999. Many countries have adopted legislation on the mandatory use of ECTS as a credit transfer and accumulation system.

2. Mobility experiences for which formal recognition is not an issue can be made more transparent and visible through instruments like the Europass Training, a Community document that since 2000 allows describing placements abroad according to a common structure. Up till then, placement organisers had largely been developing and using their own certificates, which meant that there was an abundance of different certification models in Europe. This was confusing to employers as well as a barrier to labour market mobility, and the Europass Training-initiative was introduced to provide a single, recognisable template for a certificate.

Besides providing a common European structure to describe mobility experiences, the Europass Training initiative also introduced measures that were intended to increase the quality of placements – for instance, objectives had to be defined and a mentor had to be identified. Both the sending and the hosting institutions and/or companies had to sign the document.

(4) Preparation

The Swedish Interpraktik programme started in 1997, and addresses people in the age range from 20-30 who are (or are in danger of becoming) long-term unemployed. App. 500 grants annually are available to people from this target group to go abroad on a work placement for up to six months. The grants cover costs for travel, accommodation and nurture, insurance and a modest amount of pocket money. The programme gives special attention to young people with little or no formal skills, but in principle it is open to anybody within the target group, also those with qualifications from higher education. There are no geographical restrictions on the choice of host country, and placements may be found anywhere in the world - even countries like Chile and Thailand are popular destinations. The aim with the programme is to enhance the participants' employability through the acquisition of vocational skills, intercultural skills, proficiency in a foreign language, and personal development. The programme is run by the International Programme Office in Stockholm.

Potential candidates for the programme are found through the local outlets of the employment service, which are also in charge of preparing the participants for the placement once they have been accepted. Previously, preparation was not carried out in any systematic way; but in order to combat drop-out rates of 15%, the International Programme Office carried out a campaign for more intensified preparation in 2001, where members of staff visited employment centres to run training seminars for those in charge of preparation.

The preparation courses are tailor-made for the individual participant and his/her needs, and may last for up to six months. The average preparation course lasts 10 weeks, however. The preparation does not only address linguistic and cultural issues, but may cover a range of aspects according to the precise needs of the participant: vocational, practical, pedagogical etc. The increased emphasis on preparation has meant that dropout rates in 2003 dropped to 10%.

(5) Linguistic preparation and assistance

The “Europäisches Jahr für Jugendliche”/European Year for young people (EJJ) is a German programme run by the Senate of Berlin. It is open for young people below the age of 27 from the city of Berlin, who have been unemployed for at least 6 months, and who have qualifications from initial vocational training (people with qualification from higher education are not permitted to participate). These participants are offered a nine months’ stay in a placement in another European country with a view to developing their attractiveness on the labour market as well as developing intercultural understanding. The programme has been in operation since 1993, and over a 1000 young people have participated since then. Due to budget restrictions in Berlin, the number of participants was cut from app. 120 per year to 60 in the year 2000. The programme is co-financed by the European Social Fund.

The programme is called the “European year for young people” because the actual participation last for twelve months, even though the placement period is only of nine months’ duration. Prior to starting their placement, the participants undergo a three months’ preparatory language course; of which one month is organised in Berlin, and the remaining two months are organised in the host country. The course covers in total 480 lessons. The aim of the language course is to make participants able to communicate effectively with colleagues and friends from the host country and to integrate successfully in the hosting environment. In the beginning, all language courses were in English only, but due to participant complaints this was changed so that participants received language training in the language of the host country. Language preparation is now organised in English, French, Italian, Spanish and Dutch, as most participants go to these countries. However, in principle courses in any European language may be organised, if there are enough participants to form a group. Thus also e.g. Czech and Croatian have been taught.

(6) Role of the mentor

The European Voluntary Service (EVS) is part of the EU Youth programme. In the EVS, young people between 18-25 are enabled to spend between 6-12 months doing voluntary work in an organisation in another European country in the fields of sports and leisure, art and culture, environment etc. During the stay abroad, the volunteer receives board and lodging, insurance and a small amount in pocket money; but otherwise the stay is unpaid. The stays are organised between a sending organisation, which is responsible for the preparation and the debriefing of the participant and a hosting organisation, where the participant undertakes his or her stay. The hosting organisation has to appoint a supervisor, or a mentor, who will follow the participant during the stay and help with the integration process and any problems, which might occur. For each country participating in the Youth programme, a National Agency has been set up, which undertakes the overall administration of the programme at national level, and takes initiatives to develop the activities qualitatively.

The SOHO project (SOHO is an abbreviation for *Sending Organisation/Hosting Organisation*) is an initiative that has been developed jointly by the Dutch and the Swedish national Agencies for the Youth programme. The aim of the project is to increase the quality of the stays by training the contact persons at both ends, i.e. bring together those responsible for the selection and preparation of participants in the sending organisations, and those responsible for mentoring participants in the hosting organisations. In this course, the participants are trained in the various functions of a mentor, and provided with the tools necessary to carry out their job, as well as given the possibility to exchange experience. The courses are a mixture of information sessions and experiential learning. Each course consists of participants from 4-5 countries. The SOHO courses were started up in 1999 on an experimental basis, but are now a regular feature of the programme. In 2004, 20 countries sent participants to SOHO training courses.

(7) Adequate logistical assistance

The European Secondary Schools Student Exchange (ESSSE) project is an initiative of the Council of Europe (CoE), which involves young people in the age bracket 16-19 from the European countries that are members of the CoE. These young people spend three months in another European country (typically the exchanges happen between Eastern European and Western European countries), during which time they attend school in the host country and live with a family there. The aim of the programme is to promote peace and democracy in Europe through intercultural learning. Operational responsibility for the programme has been delegated to the European Federation for Intercultural Learning (EFIL), which is an umbrella organisation for the AFS organisations in Europe. The exchanges are carried out by the member organisations of EFIL, which are voluntary, non-profit NGOs active in the field of youth exchange. In total, 23 European countries participate in the scheme, and in the years 1998-2002, 333 students went abroad with this programme.

To ensure the quality of the learning experience, a set of quality criteria has been formulated; an important part of which concerns logistical support. The term “logistical support” covers a number of issues. The sending organisations will provide detailed information regarding travel, the obtaining of the appropriate visas and permits in the host country, and other official documentation regarding social security, insurance etc. Under this heading also falls negotiating with schools to allow the recognition of the study period abroad, and negotiating enrolment procedures for students to be hosted. In addition, all organisations in the AFS system have developed individual safety handbooks that cover essential information for the student to warrant a safe sojourn: what to do when one gets lost, traffic laws, rules for hitch-hiking etc. as well as giving emergency numbers that can be used in the event of accident, illness, theft etc. The obligations for sending and hosting organisations in terms of logistical support have been written up in a quality charter that gives participants, parents and participating organisations and institutions a clear impression what they can expect.

(8) Debriefing and evaluation

The French Agence Nationale Pour l'Emploi (ANPE) ran a mobility project from 1997 to 2001 with financial assistance from the Adapt-initiative under the European Social Fund (the Adapt/Steer-project). The project targeted people who had lost their job due to industrial restructuring. As a part of the general services of the ANPE, these people were offered the possibility of formulating, together with a counsellor, a personal action plan involving individualised training to bring them back into employment. The Adapt/Steer project specifically targeted people who were interested in a career with an international dimension, and offered, as part of the personal action plan, a 4-8 week placement period abroad in order to further their career aims. In total, some 400 people benefited from such an experience in project's lifetime, acquiring foreign language proficiency and intercultural skills, building up networks abroad, getting knowledge of technology and foreign markets as well as undergoing a personal development. In comparison with other mobility programmes and projects, the participants were significantly older: no less than 52% were over the age of 36. Moreover, 42% of the participants only possessed qualifications from upper secondary education or lower.

The personal counsellor of the participant would monitor the stay abroad, but would also be available after the experience to help the participant evaluate his or her experiences and assess their impact on the career plan. An important part of the counsellor's task was to help the participant get the knowledge and the skills thus acquired properly validated in the context of the training scheme. The counsellor would thus follow the participant for an extended period after the stay, until the goal of employment was reached or the participant passed on to other measures. This period after the stay was seen as an absolutely essential part of the project.

(9) Assistance with re-integration

The Marie Curie actions under the EU 6th framework programme for research consist of a coherent set of 11 actions that finance training and other career development opportunities for researchers in Europe. A condition for receiving grants under most of these actions is transnational mobility; i.e. that the researcher is prepared to go abroad to pursue his or her continuing vocational development and research. The Marie Curie actions only concern long-term mobility of researchers; i.e. typically stays at a research institution in another country of between 1-3 years' duration. There is no age limits for participants.

There are two actions aimed at supporting researchers' integration into their careers after a period of mobility abroad: the Marie Curie European Reintegration Grants for researchers who have participated in a Marie Curie mobility action, and the Marie Curie International Reintegration Grants for European researchers who have been carrying out research outside of Europe for at least five years, and wish to return. In the case of the former, the stay abroad must have been of a duration of at least 2 years (24 months). The reintegration assistance consists of a grant of up to 40,000 euro, which will be made available to a research institution prepared to offer the researcher a contract of at least two years. The grant cannot be used for salary of the researcher, but must be used to cover other costs in connection with a research project, on which the returned researcher must work (assistants' salaries, depreciation of equipment purchased etc.). The application for a reintegration grant should be made at least six months before the end of the mobility/training period.

(10) Clear definition of commitments and responsibilities

The project Pegase is a Leonardo da Vinci pilot project concerned with the pedagogy and quality of transnational placements. It is led by the Lycée Nicolas Appert in Orvault (F), and comprises partners in Ireland, the UK, Germany and Hungary. In this project, the concept of transnational placements was analysed, and the actors and their role in the crucial elements in each of the three placement phases (preparation, implementation and evaluation/debriefing) identified. On the basis of this analysis, a system of quality assurance has been developed in the shape of a guide for the management of transnational placement projects. This guide consists of a detailed set of guidelines for each actor (trainee, host company, sending institution, public authorities etc.) and a series of forms that can be filled in either electronically or on paper, with clear indications of when this needs to be done. These forms and guidelines inform each actor about his/her tasks or duties and when these have to be performed, and is thus a pedagogical aid for these. At the same time it allows the project coordinators to control that all the necessary tasks have been completed on time and by the relevant actors.