

BFUGB13 3b

1 September 2006

**Update on Portability of Grants and Loans Working Group
Bologna Follow-Up Group Board Meeting
1 September 2006 Helsinki****Working Group Chair – Aldrik int’Hout, The Netherlands**

The first meeting of the working group took place on 16 June. A copy of the minutes of that meeting are attached. They describe how the group was divided into three sub-groups and assigned different areas of the subject to look at in detail. Since then the three sub groups have continued to work on the different assignments. Questionnaires had been produced and most of them had been completed and returned. At this time the analysis of the completed questionnaires is in progress.

The next meeting of the Working Group will take place on 7th and 8th September. This is when the group plan to finalise the next set of results from the questionnaires.

On 7th September the sub-groups will get together to finalise their tasks, and on 8th September the results will be presented to the whole Working Group to decide on the next steps.

Bologna Secretariat for Annelise Sprenger

Notes of the first meeting of the Portability of Grants and Loans Working Group, The Hague – 16 June 2006

Those present:

Austria: Herman Holubetz.
Bologna Secretariat: Louis Ripley.
Croatia: Melita Kovacevic.
England: Andrew Smyth.
ESIB: Koen Gevin.
European Commission: Jurgen Rienks.
Finland: Virpi Hiltunen.
Germany: Andreas Schepers.
Ireland: Pat Dowling.
Lithuania: Jelena Kasjanova; Stanislava Lipinskiené.
Norway: Kari Hoel.
Romania: Ion Ciuca; Radu Damian.
Scotland: Kathleen Robertson.
Sweden: Linda Torvang.
Switzerland: Katharina Eggenburger.
The Netherlands: Aldrik in 't Hout; Marlies Leegwater; Annelise Sprenger.

Apologies: **Albania:** Anila Theodhori; **Belgium:** Isabelle De Keyzer.

1. Opening and Introductions

Ans Gottenbos (Deputy managing director, department of Student Finance Policy, Dutch Ministry of Education, Culture and Science) welcomed everyone to the meeting and referred to the Ministerial Commitment in the Bergen Communiqué where the following text was incorporated:

Mobility

We recognise that mobility of students and staff among all participating countries remains one of the key objectives of the Bologna Process. Aware of the many remaining challenges to be overcome, we reconfirm our commitment to facilitate the portability of grants and loans where appropriate through joint action, with a view to making mobility within the EHEA a reality. We shall intensify our efforts to lift obstacles to mobility by facilitating the delivery of visa and work permits and by encouraging participation in mobility programmes. We urge institutions and students to make full use of mobility programmes, advocating full recognition of study periods abroad within such programmes. (Bergen Communiqué, May 2005).

Ans reiterated that at BFUG8 in Vienna in April 2006 it was agreed that Portability of Grants and Loans would be taken forward by an official working Group. She pointed out that there will be little time to carry out the necessary work and it will be important to work efficiently. No harmonisation should be intended and the objective will be that mobility is the desired outcome with portability being a means to that end. The activities of the group were intended to compliment the work of the Social Dimension and Data on Mobility Working Group. Ans wished the group every success in its endeavours and handed over to Aldrik in 't Hout to Chair the meeting.

There were no comments on the Agenda which was adopted.

2. Deciding on the time schedule; organisation of work; arranging subgroups; agree dates and locations of follow up meetings.

Referring to the draft background paper which had been prepared for the meeting, the Chair outlined the time scale of the three phases of the work plan and the suggested way in which the work might be organised through subgroups. Comments were invited on the described general approach.

In discussion the following points were made on the draft work plan:

Definitions

- There were some concerns about the proposed 'Definitions' subgroup and its overlap with the work of the 'Descriptions' group. Several members felt that to have a separate group working on definitions would be likely to undermine the consistency of the other working group's activities and definitions should be agreed at the start. There was general agreement that this should involve the whole group. So no subgroup on definitions was formed. Instead the main definitions were discussed.
- What did Ministers mean by the term 'portability' at Bergen?

When speaking about portability of student support one usually means the possibility to obtain the same support that is available for studies in the home country for studies abroad.

NB: This was not widely discussed: however in the Eurydice handbook for Standardised Data Collection for key data some useful definitions are available. The relevant two pages are included.

- The definition of 'abroad' for the purpose of portability will mean the entire European Higher Education Area. (questions on portability will be included in the Eurydice questionnaire).
- The definition of 'Grants and Loans' should refer to the direct contribution from states to students.
- 'Portability' should be viewed from the perspective of the home country.

EU-Law (subgroup)

- It would be helpful if Denmark participated in the EU Law group as they had particular experience in this area due to the fact Hanna Dam participated in the Legal Expert Group.
- There will be a need within the EU Law subgroup to also consider individual national laws. EU law will also need to be considered in terms of the differences with non-EU countries.

- Consideration needed to be given to countries with no student support systems.
- EU students are entitled to the same fee support as national students in the host country when attending a higher education institution throughout the EU. For these students fee support will be a lesser issue. Some countries provide fee support as part of their package of student help and there may be instances where fee support will need to be considered in addition to grants and loans.
- Most of the Bologna countries were from within the EU. There will be a need to ensure that support will not be duplicated in the host, as well as the home country.
- The working group needed to be aware of the danger of a potential two tier system evolving i.e. a system for EU Bologna countries and another for non-EU Bologna countries.
- Joint actions will need to be considered in conjunction with EU-Law. The Bergen Communiqué suggested a wider aspiration on this where it stated 'where appropriate through joint action.'

Best practice (subgroup)

- The sub-group should include consideration of the existing practice in Scandinavia / Nordic countries.

Description of national student support systems (subgroup)

- There are likely to be limitations for portability both geographically and in terms of the levels of study.
- Scope will need to be considered. To aim for too broad a scope considering all cycles may however not be realistic.
- Grants and loans support at different cycles will be likely to vary considerably in different countries. This is of course part of the choices each country has made and will be making in the future.

Data sources

- Eurydice's report would include key data on portability. The Secretariat will be following up on Eurydice returns for non-EU countries. It was pointed out that the data will not be ready by the end of Phase 1 in September.
- It will be important to make best use of existing expertise / sources of information as this will save work. (Included is a list of contacts for "Eurostudent".

Bologna representation within the working group

- The needs of all Bologna member states will need to be considered. However, this may be too ambitious and it may be possible to do this through the strong cross representation of the working group. It was agreed that information gathering will be limited to the countries participating in the working group.

It was agreed that:

A definitions subgroup was not necessary as all members of the working group will be involved in this.

The activities of the previously proposed subgroup – ‘Remaining mobility issues’ would be reconsidered at a later Phase.

The 3 Phases of the time schedule were adopted.

Phase 1 should focus upon the activities of the first three subgroups listed in the work plan. Phase 1 should focus upon ‘identification’ whilst recommendations should be made in the next Phase after initial findings had been fully evaluated.

The agreed subgroups for Phase 1 would be:

- *EU-Law*
- *Best Practices (of at least Scandinavia)*
- *Descriptions of national student support systems*

3. Split up into subgroups

All attendees indicated which subgroup they wished to participate in. . Feedback from the separate discussions is itemised in Agenda Item 4.

4. Presentation of subgroup findings / plans of action

The Chair asked for feedback from the three subgroup discussions on how to meet the objectives of Phase 1. The first group to provide feedback was the Descriptions subgroup. The feedback was provided by Louis Ripley (Bologna Secretariat)

Descriptions of national student support systems (subgroup3)

The subgroup had been asked to consider three principle areas:

- What support systems are there in the different countries
- To what extent are these portable
- What obstacles are restricting portability

Feedback from the subgroup's discussion including brief summaries of a number of the different kinds and levels of grants and loans in Bologna countries. Issues discussed had included what constituted portability. For example one country provided a limited number of scholarships mainly for students studying abroad, available through competition. The scholarships were only available however to a limited percentage of the student population.

Other issues discussed included the potential limitations on portability such as differing support levels at different cycles and obstacles to portability such as incompatible or no social security systems.

Proposed Objective: The Descriptions subgroup proposed that the information gathered during the afternoon's discussion be adapted to form the basis of a questionnaire for the working group. The aims of the questionnaire would be to gather comprehensive descriptions of the members countries' different student support systems and to identify where the differences lay.

Estimated timescale: (proposed subsequent to the working group meeting)

- Draft questionnaire to subgroup members for comment by 30 June .
- Group members to comment on the questions by 7 July.
- Final questions out to group by 14 July.
- Filled in questions returned to Louis Ripley by 18 August.
- Report from Sub Group to Working Group for 7-8 September meeting.

Best practice subgroup subgroup 2

Kathleen Robertson (Scottish Executive) provided feedback on the subgroup's discussion.

The subgroup were asked to consider:

- How does the portability work.
- What bi-lateral agreements are made in order to carry this out.

It was proposed in discussion that the objective of the subgroup should be to describe current practice of portability in Nordic Countries (Sweden, Finland, Denmark, Norway), Germany, Netherlands, Ireland and Lithuania; and to focus upon the administrative and practical arrangements in place.

Proposed Aims:

- To highlight the common factors of models that could be part of a portability 'toolkit'
- To highlight the common areas of concern that could be part of a portability 'toolkit'
- To highlight any areas where further collaborative action can be taken across current and future countries offering portability, to make administration easier.

Proposed timescale:

- Questionnaire to subgroup members by 23 June.
- Group members to comment on the questions 30 June.
- Final questions out to group + Lithuania by 4 July.
- Filled in questions returned to Kathleen by 18 August.
- Report from sub group to be submitted for 7-8 September meeting.

EU-Law subgroup 1

Feedback was provided by Aldrik in 't Hout (Ministry of Education, Culture and Science, the Netherlands).

This subgroup were asked to consider:

- The juridical consequences on the portability of grants and loans

Aldrik explained that consideration would be given to the comments made earlier in the meeting. Particular focus will be given to working with the European Commission and colleagues from Denmark.

The proposed timescale for Phase 1 of the EU-Law subgroup's activities:

- Consideration of the key questions 17 July.
- Reflection upon each member of the subgroups work circa 16 August.
- Feedback to group with a summary of findings 7-8 September.

It was agreed that:

The proposals of the 3 subgroups were approved.

To avoid duplication in the two draft questionnaires. Kathy would include Louis in the circulation of her draft, which she expected to circulate by 23 June. The final 'Best Practices' questionnaire would be aimed at gathering information from the countries of the members of the subgroup whilst the final 'Descriptions' questionnaire would be distributed to the full working group.

The subgroups were advised that a great deal of data was already available and full use should be made of these sources of information.

5. Conclusion

Andreas Schepers asked if he could transfer from the Descriptions subgroup to the Best Practice subgroup as on reflection he thought he could better contribute in that subgroup. Edward Galler from Austria would be asked if would be content to join the Descriptions subgroup.

It was agreed that the next meeting would be in Glasgow 7-8 September.

