

COMMISSION OF THE EUROPEAN COMMUNITIES

COM(94) 180 final

Brussels, 16.05.1994

94/0001 (COD)

Amended proposal for a
EUROPEAN PARLIAMENT AND COUNCIL DECISION
establishing the Community action programme
"SOCRATES"

(presented by the Commission pursuant to Article 189 A (2)
of the EC-Treaty)

EXPLANATORY MEMORANDUM

Further to the opinion of 22-04-94 of the European Parliament from their first reading, the Commission, in accordance with Article 189A, paragraph 2, of the TEU, is presenting a modified Proposal for a Decision to the Council. The text includes two main types of modification:

- one group of amendments adding helpful clarifications and detail to the initial proposal;
- a second group of amendments reinforcing the proposal, in particular where the target groups of the programme are concerned.

The modified proposal of the Commission retains the same overall structure and the same objectives as the initial proposal, but it has been developed and gives better focus to certain provisions.

Out of 104 amendments of the European Parliament 56 have been rejected.

These 56 rejected amendments cover:

- the legal base on the single Article 126 of the Treaty (amendments 1, 2, 4, 5); The Commission upholds its position on the double legal base (Articles 126 and 127 of the Treaty) for the reasons given under Whereas 6 of its initial proposal;
- inclusion of provisions making reference to the responsibilities of the Member States and their internal organisation, and which thereby go against the principle of subsidiarity (amendments 28, 45, 54, 58, 68);
- inclusion of provisions making reference to the composition of the Advisory Committee or to its tasks, which are counter to the provisions of the "comitology" in force (amendments 38, 39, 40, 43);
- introduction of preferential treatment for regions or establishments in cohesion states (amendments 11, 22, 59, 81, 105, 126, 76); The Commission considers that the fundamental basis for the SOCRATES programme is the quality of the activities requesting funding and that, through its selection policy, it encourages all regions to participate;
- introduction of language learning to categories which are not considered to be targets of the programme (amendments 41, 79, 89, 95);
- deletion of certain elements of cooperation in the field of distance education which would have consequences for the qualitative aspects of cooperation in this area (amendments 99, 100);
- introduction of provisions to allow the opening up of the programme to other associated European countries (amendments 20, 49);

The Commission considers that such opening could be effected through more specific legal instruments and not in the framework of this Decision;

- introduction of research activities which could be eligible under the Fourth Framework Programme for Research (amendments 37, 62, 106);
- introduction of changes to the formulae for the distribution of Community funds in the various Actions of the programme which puts the coherence of the text in jeopardy (amendments 66, 73, 74);
- introduction of elements of very broad cooperation (university meetings) or of exceptions to the rules in force (minimum duration of study periods undertaken abroad) (amendments 52, 53);
- introduction of a provision for automatic renewal of existing programmes (ERASMUS, LINGUA) or planning for an essential transition period (amendments 21, 50);
The Commission considers that it would be legally impossible to include potential prolongation of existing programmes in a planned co-Decision which, once adopted, would render ineffective the proposal concerned. Moreover, the question concerning transition measures will be decided after the adoption of the programme and in cooperation with the Advisory Committee;
- reduction of the minimum number of establishments participating in cooperation activities (amendment 77) or the time required for undertaking the interim evaluation report (amendment 48);
The Commission upholds the provisions of the initial proposal for reasons of feasibility and efficiency;
- inclusion of a provision referring to the competence of the Commission to manage the programme and the possible requirement for external technical assistance (amendment 42)
- finally, alternative renderings of the text which do not improve the initial text and are therefore considered "unnecessary" (amendments 3, 6, 8, 24, 44, 60, 61, 69, 90, 93, 94, 97, 98, 101, 102).

In addition, the Commission wishes to draw the Council's attention to three amendments of the European Parliament (numbers 65, 71, 91) which aim to provide names respectively for Chapter I, Action 3 (ERASMUS grants), Chapter II (COMENIUS Programme) and Chapter III (LUIS ANTONIO VERNEI) of the Annex to the Proposal for a Decision. The Commission keeps an open mind on these three amendments and especially with regard to the first two. It emphasises, nevertheless, that the takeup by the Council of these three amendments, in consideration with other formulations already proposed, should not lead to a fragmentation of "SOCRATES", which, given the concern for coherence sought by the Commission, should rather keep a unitary character and thereby avoid any loss of visibility.

The European Parliament and
the Council of the European Union

Having regard to the Treaty establishing
the European Community, and in particular
Articles 126 and 127 thereof

Having regard to the proposal from the
Commission¹

Having regard to the opinion of the
Economic and Social Committee²

Having regard to the opinion of the
Committee of the Regions³

1. Whereas the treaty establishing the European Community (hereafter "Treaty"), as modified by the Treaty on European Union, stipulates in its Article 3 p) that Community action should include a contribution to education and training of quality; that the Treaty henceforth includes a Chapter 3 devoted specifically to education, to vocational training and to youth.
2. Whereas by virtue of Article 126, paragraph 1 of the Treaty, the Community shall contribute to the development of quality education by encouraging cooperation between Member States and, if necessary, by supporting and supplementing their action, while fully respecting the responsibility of the Member States for the content of teaching and the organisation of education systems and their cultural and linguistic diversity.

3. Whereas by virtue of Article 127, paragraph 1 of the Treaty, the Community shall implement a vocational training policy which shall support and supplement the action of the Member States, while fully respecting the responsibility of the Member States for the content and organisation of vocational training.

4. Whereas the Council, by its Decision 87/327/EEC⁴ as amended by Decision 89/663/EEC⁵ based on Article 128 of the EEC Treaty, adopted the ERASMUS programme to promote the mobility of university students and, by its Decision 89/489/EEC⁶ based on Articles 128 and 235 of the EEC Treaty adopted the LINGUA programme to promote foreign language ability in the Community.

5. Whereas the Council, by its Decision .../... of⁷, adopted, on the basis of Article 127 of the Treaty, a decision establishing an action programme for the implementation of a European Community vocational training policy; that it is appropriate to complete this first programme by the adoption of a second; taking into account the implementation of the ERASMUS and LINGUA programmes and including three types of action, covering specifically
 - higher education
 - school education and

horizontal measures including the promotion of language skills in the Community, of open and distance education and learning, and the promotion of information.

6. Whereas while school education constitutes education in the sense of Article 126 of the Treaty, the other measures envisaged under the current decision are inextricably linked to both education and vocational training; that this is especially the case in the realm of higher education, in so far as student and teaching staff mobility, or measures for the promotion of language skills, may be combined with the training of teachers; that it is appropriate, henceforth, to base the current decision on Articles 126 and 127 of the Treaty.

7. Whereas the reports evaluating the ERASMUS and LINGUA programmes, the conclusions of which are set out in the Commission report on the results and achievements of these programmes⁸, point out that cooperation in the field of education significantly enhances the value of measures taken by Member States, and that Community action in this field is therefore of great importance.

8. Whereas the Commission Memorandum on higher education⁹ and the summary report of discussions within the Member States¹⁰, together with the Parliament Resolution on this subject¹¹, place particular emphasis on the need for a Community strategy to promote the European dimension in courses followed by all students, whether in their own country or abroad, and on the catalytic role of the Community in this connection.

9. Whereas the Council and the Ministers of Education have agreed guidelines for the introduction of the European dimension into educational study, particularly through the Resolution on the European dimension in education¹²; that the Green Paper presented by the Commission on this matter¹³ as well as the comments received from the Member States on the same subject, aim to introduce the European dimension in primary and secondary teaching.

10. Whereas the European Council, meeting in Brussels on 10-11 December 1993, adopted, in the light of the White Paper presented by the Commission, an action plan on growth, competitiveness and employment, inviting the Member States in particular to pay specific attention to the improvement of education and training systems.

11. Whereas the European Parliament has, on its own initiative, adopted two reports on the European dimension in education at university level, with the emphasis on mobility of students and teaching staff¹⁴, and on education and training policy from the standpoint of 1993¹⁵._____

12. Whereas open and distance education and learning offers considerable new opportunities for enriching education and for economies of scale, with an increased impact especially on the promotion of a European dimension in the studies at all levels.

13. Whereas it is necessary to simplify and rationalise Community actions in the field of education and training, reinforcing those aspects which are most promising as regards added value and European impetus; that it is appropriate, in this matter, to encourage transnational projects linking partners from different Member States who are involved in the transfer of innovation through exchanges, taking due respect of the diversity of the educational systems and the responsibility of the Member States.

11. Whereas the European Parliament has, on its own initiative, adopted the reports on the European dimension in education at university level, with the emphasis on mobility of students and teaching staff (14), on education and training policy from the standpoint of 1993 (15), and on cultural diversity and the problems of school education for children of immigrants in the the European Community. (16)

12. Whereas the Commission Memorandum on open and distance learning (17) and the European Parliament's various resolutions on the subject pointed out that this form of education offers increased opportunities for learning by drawing on new concepts and methods and particularly with regard to promoting the European dimension of studies at all levels, and whereas it represents an inexpensive alternative means of access to education and offers disadvantaged groups in particular the opportunity of exercising their right to education.

14 Whereas, in order to increase the efficiency of Community action so that it may perform a multiplier function, it must also be ensured that the assisted structures are open to people other than those directly assisted, which means that they must be so arranged that 'free movers' may also derive maximum benefit from Community value added.

15 Whereas special measures are needed to promote equal opportunities for boys and girls, men and women so that they may have every opportunity to develop and the best possible chance of participating in economic, social and political life.

14. Whereas specific measures need to be taken in favour of migrant workers' and gypsy children in order to combat exclusion and racism; it is appropriate to ensure equality of opportunity as well as the integration into the standard education system of children and adolescents with disabilities.

16. Whereas Community action must be geared to promoting cross-frontier and intercultural communication;

17. Whereas it is necessary to promote an intercultural dimension in education for all pupils in the European Union so as to prepare them to live in a society which is increasingly characterized by cultural and linguistic diversity; whereas measures need to be taken to improve the quality of education for the children of migrant workers, children of gypsies and children of occupational travellers, and to combat racism and xenophobia.
18. Whereas the Council and the Ministers of Education have adopted resolutions aimed at improving school provision for gypsy children and children of occupational travellers
19. Whereas it is necessary to ensure equality of opportunity as well as the integration into the standard education system of children and, as far as possible, adolescents with disabilities, and make efforts, where necessary, to assist them in special schools.
20. Whereas the success of mobility depends to a great extent on the social facilities provided by the Member States and the host establishments.
21. Whereas it is to be recommended, since the European dimension in education extends beyond the European Union, that there be cooperation with the Council of Europe so that non-EU countries may also be involved.

15. Whereas the EURYDICE network should be developed and diversified in order to be able to respond to requirements for qualitative and quantitative information on education.

22. Whereas the EURYDICE network should be developed, diversified and made accessible to all educators in order to be able to respond to requirements for qualitative and quantitative information on education.

HAVE ADOPTED THIS DECISION:

- (1) OJ C 66 of 3.3.1994, p. 3
- (2) ...
- (3) ...
- (4) OJ L 166 of 25.6.1987, p. 20
- (5) OJ L 395 of 30.12.1989, p.23
- (6) OJ L 239 of 16.8.1989, p.24
- (7) OJ L
- (8) COM (93) 151 final of 5.5.1993
- (9) COM (91) 349 final of 5.11.1991
- (10) "Studies" Series No 2, TFRH - 1993
- (11) OJ C 255 of 20.9.1993, p. 161
- (12) OJ C 177 of 6.7.1988, p. 5
- (13) COM (93) 457 final of 29.9.1993
- (14) OJ C 48 of 25.2.1991, p. 216
- (15) OJ C 150 of 15.6.1992, p. 366

- (16) OJ C 42 of 15.2.1993 p. 187
- (17) COM (91) 388 final

Article 1

Establishment of the Community Action Programme "SOCRATES"

1. This Decision establishes the Community Action Programme "SOCRATES", hereinafter referred to as "Programme SOCRATES", for the period 1 January 1995 - 31 December 1999. The programme is intended to contribute to the development of quality education and training and of an open European area for education. It will come into force on 1 January 1995.

1. This Decision establishes the Community Action Programme 'SOCRATES', hereinafter referred to as 'Programme SOCRATES', for the period 1 January 1995-31 December 1999. The programme is intended to contribute to the development of quality education and training, accessible to all, in order to provide 'life-long' education, and the creation of an open European area for education. It will come into force on 1 January 1995.

2. The education programme shall comprise three areas of Community action:

- Chapter I - Higher education
- Chapter II - School education
- Chapter III - Horizontal activities in the areas of language learning, of open and distance education and learning, and information.

Article 2

Definitions

1. In the context of this programme,

- the term "university" shall cover all types of higher education institutions which offer qualifications or diplomas at that level, whatever such institutions may be called;

- the term "school" shall cover all types of institutions at nursery, primary and secondary school levels providing general, vocational or technical education and, exceptionally, and for the promotion of exchanges of pupils within the framework of language projects, non-school institutions providing apprenticeship training;

- the term "educator" shall cover persons whose duties involve them directly or indirectly in the educational process (teachers, inspectors, educational advisers, etc.);

- the term 'educator' shall cover all persons whose duties concern them directly or indirectly with the educational process;

- the term "student" is used for persons registered in universities (see definition of this term, above), whatever their field of study, in order to follow higher education studies leading to a degree or diploma (or equivalent), up to and including the level of doctorate;

- the terms "open and distance education and learning" are used to describe all forms of flexible education, including the use of technologies and advanced facilities in information and communication, especially telematic systems, and personal educational support systems of an advisory and tutorial nature;

- the terms "information and communication technology" are used to describe the use of systems (technological and associated facilities) of information (acquisition, processing, viewing, storage of information) and communication (by satellite, cable or Hertzian means) such as the multi-media tools, telematic facilities designed for education, and access to electronic information services, whether local (interactive or otherwise compact disk) or at a distance (knowledge based systems);

2. Each Member State shall specify the types of institutions referred to in this Article.

Article 3

Objectives

The specific objectives of the programme "SOCRATES" shall be:

i) to develop the European dimension in studies at all levels so as to strengthen the spirit of European citizenship, drawing on the cultural heritage of each Member State;

- the terms 'open and distance education and learning' are used to describe all forms of non-traditional, flexible education where teachers and learners are in different places and including the use of technologies and advanced facilities in information and communication;

- the term 'pupil' is used to describe children, adolescents, young people and others registered for any educational courses below university level (see previous definition)

i) to help to improve the quality of education and to develop the European dimension in studies at all levels so as to strengthen the spirit of European citizenship, drawing on the cultural heritage of each Member State;

- ii) to promote knowledge of the languages of the Community so that the citizens of the Community may take advantage of opportunities arising from the completion of the European Union, leading to greater understanding and interaction between the peoples of the Community;
 - iii) to increase mobility for the Community's students, especially those in higher education, so that they have the opportunity to complete part of their studies in another Member State;_____
 - iv) to promote broad and intensive cooperation between institutions at all levels of education in every Member State, and to realise their intellectual potential through the mobility of their teaching staff and other educators thus helping to improve the quality of teaching;
- ia) to promote access to education, particularly for the less-privileged actively combating social exclusion, especially with regard to participation in mobility initiatives organized in the framework of the programme;
 - ii) to promote knowledge of the languages of the Community and promote the intercultural dimension of education so that the citizens who live in the Community may take advantage of opportunities arising from the completion of the European Union, leading to greater understanding and interaction;_
 - iii) to increase mobility especially for students in higher education, so that the Community may benefit from graduates who have completed part of their studies in another Member State, and to achieve the goal of at least 10% participation.
 - iiia) to promote cooperation between the services responsible for social conditions at universities, so that mobility may be increased and, in particular, encouragement may be given to those who study under particularly difficult circumstances (disabled students, students with children and students from less privileged backgrounds);

- v) to encourage the academic recognition of diplomas and periods of study, in particular through the introduction of academic credits and modules aimed at facilitating such recognition at Community level;
 - vi) to develop the use of communication and information technologies as a tool and subject for education, including use of multi-media materials and information, and telematics at all levels of education;
 - vii) to promote intellectual mobility of knowhow and experience, in particular through the development of open and distance education and learning at all levels of teaching;
 - viii) to foster exchanges of information and experience with a view to ensuring that the Member States may learn and benefit from each other's educational systems.
- v) to encourage the academic recognition of diplomas and periods of study, in particular through the introduction of academic credits and modules and by the further development of the ECTS programme (European credit transfer system) created in the context of ERASMUS, aimed at facilitating such recognition at Community level;
 - vii) to promote mobility of knowledge and experience, in particular through the development of open and distance education and learning at all levels of teaching;

Article 4

Committee

The Commission shall be assisted by an advisory committee composed of two representatives from each Member State and chaired by the Commission representative.

Twelve representatives of the social partners, educators, parents, students and young people, appointed by the Commission on the basis of proposals from non-governmental organizations operating at European level, shall participate in the work of the Committee as observers.

The Commission representative shall submit to the Committee plans for the measures to be taken. The Committee shall deliver its opinion on these proposals within a time limit which the chairman may lay down according to the urgency of the matter, if necessary by taking a vote.

The Committee's opinion shall be recorded in the minutes; in addition, each Member State shall have the right to ask for its position to be recorded in the minutes.

The Commission shall take the utmost account of the opinion delivered by the Committee, and shall inform the Committee of the manner in which its opinion has been taken into account.

Article 5

Implementation

1. The Commission shall ensure the implementation of the programme "SOCRATES" under the arrangements set out in the Annex.

2. Decisions in the following areas shall be subject to the procedure defined under Article 4:

- a) priorities in the Community measures described in the Annex and the annual workprogramme deriving therefrom;

1. The Commission shall ensure the implementation of the programme "SOCRATES" under the arrangements set out in the Annex.

It shall also ensure that the Parliament is kept fully informed on the implementation of the programme.

- b) the financial support to be provided by the Community (amounts, duration and beneficiaries);
- c) the breakdown between the different strands;
- d) the procedures for selection, evaluation, and dissemination and transfer of results.

Article 6

Cooperation with Member States

1. The programme "SOCRATES" shall support the policies adopted and implemented by Member States under their internal structures, having regard to the characteristics and scope of their educational systems, with the aim of achieving the objectives set out in Article 3.

In terms of the development of linguistic skills as a fundamental means of communication within the Community, the Community shall support Member States' policies which encourage all citizens to learn new languages by increasing the opportunities for learning and increasing the range of languages offered.

2. Member States shall entrust the implementation of the actions described in the Annex to the various competent authorities responsible at national level.
3. The Commission shall cooperate closely with these authorities for the purposes of promoting and providing information on the actions described in the Annexe, and disseminating the results of the programme.

Article 7

Consistency and complementarity

1. The Commission shall strive to ensure overall consistency between this programme and the action programme for the implementation of a Community policy on vocational training.
2. The Commission, in partnership with the Member States, shall foster an element of complementarity between the operation of this programme and the interventions of the Structural funds, especially Community initiative programmes.
3. The Commission, in partnership with the Member States, shall encourage the coordination of activities between this programme and the Fourth Research and Development Framework Programme.

Article 8

Monitoring and evaluation

1. The programme shall be continuously monitored on a partnership basis involving the Community and the Member States. This monitoring shall permit, as necessary, the reorientation of the programme in the light of any needs becoming apparent in the course of its operation.

Monitoring, financial management and control shall be implemented by the Commission.

2. The programme shall be subject to a regular evaluation on a partnership basis between the Commission and the Member States. The results of Community measures shall be evaluated by external bodies at regular intervals.

2. The programme shall be subject to a regular evaluation on a partnership basis between the Commission and the Member States, with the participation of the parties concerned. The results of Community measures shall be evaluated by external bodies at regular intervals. The findings of these evaluations shall be submitted Committee provided for under Article 4 and to the European Parliament.

3. The Commission shall submit to the Council, the European Parliament, the Economic and Social Committee and the Committee of Regions, before 30 September 1998, an interim report on the launch phase, and before 30 September 2000, a final report on the implementation of the programme.

Done at,
on

For the European Parliament

For the Council

The President

The President

Annex

The purpose of the "SOCRATES" programme is to support the transnational actions planned in the different chapters of the programme.

CHAPTER I

HIGHER EDUCATION

This chapter describes three "ERASMUS"-type actions aimed at:

- promoting the European dimension in higher education institutions;
- setting up European university networks;
- funding student mobility grants.

ACTION 1

PROMOTION OF THE EUROPEAN DIMENSION IN HIGHER EDUCATION INSTITUTIONS

1. Drawing on experience gained from the ERASMUS and LINGUA programmes, the Community will continue to encourage transnational cooperation between universities, especially through the development of inter-university cooperation programmes (ICPs). These programmes aim to achieve the gradual setting up by the universities of a policy to give a European dimension to higher education studies in general.

2. The following inter-university cooperation activities may qualify for Community financial assistance:

- student mobility providing university students with an opportunity to undertake a period of study in another Member State, accompanied by practical experience where appropriate, such periods being fully recognized as an integral part of their diploma or academic qualification
- introduction or extension of the ECTS course credit transfer system which greatly enhances the transparency of procedures for academic recognition of diplomas or periods of study completed abroad;
- joint development of initial or advanced curricula geared to facilitating academic recognition and contributing, through exchanges of experience, to the process of innovation and improvement of the quality of education at Community level;
- mobility of teaching staff for the purpose of providing instruction forming an integral part of the curriculum in another Member State, or enabling them to carry out study visits to pave the way for cooperation. Study visits may also be carried out by administrative staff of universities and by students assisting the university in connection with activities to promote inter-university cooperation;

2. In the framework of inter-university cooperation programmes the Community will provide financial support for agreed measures for the organization of the following activities:

intensive courses for students from different Member States, particularly in areas of study which do not lend themselves to long periods abroad;

provision of teaching and learning material centred on Europe and easier access to European data bases (former European reference and documentation centres).

3. Priority will be given to student mobility programmes and activities connected with their preparation (language courses, in particular for the lesser used languages of the Community, information on social and cultural aspects of the host country etc.). Students in the first year of their studies will not be eligible for mobility grants.

The following conditions must be fulfilled in order to ensure that periods of study spent abroad are of maximum benefit to students:

- a. studies abroad shall be carried out on a full-time basis and for a significant period of time (a minimum of three months or one term, and a maximum of one academic year);
- b. studies undertaken in other Member States shall be fully recognized by the university of origin;
- c. students shall have a satisfactory knowledge of the language in which courses are given by the host university;

d. host universities shall not charge tuition fees to students participating in mobility schemes.

e. host universities shall endeavour to resolve students' practical problems (for example as regards reasonably priced accommodation).

4. The Community will also encourage universities to develop activities designed to bring a European dimension to all areas of study for the benefit of each and every student. The following activities could receive Community support:

- the incorporation into curricula of elements designed to enhance understanding of the cultural, political, economic and social characteristics of other Member States as well as elements relating to European integration, especially through the creation of multi- or inter-disciplinary modules;
- learning of the languages of the Community as an integral part of studies, with the emphasis on lesser used or lesser taught languages;

5. Universities wishing to set up the activities with a European dimension, described above, at institutional level will be able to conclude an "institutional contract" with the Commission covering all the activities eligible for Community assistance. Community financial assistance will cover a maximum period of three years initially, subject to regular reviews of the results.

5. Universities wishing to set up the activities with a European dimension, described above, at institutional level will be able to conclude in 'institutional contract' with the Commission covering all the activities eligible for Community assistance. Special treatment will be given to those universities which opt for the 'institutional contract'. Community financial assistance will cover a maximum period of three years initially, subject to regular reviews of the results at least once a year.

The criteria for entering into the above-mentioned institutional contracts and the terms of the parties' common obligations shall be laid down and widely disseminated by the Commission after consultation with the Advisory Committee.

6. Financial assistance may also be granted to groups of universities at regional, cross-border or other levels, for the purpose of developing jointly one or more of the activities mentioned in point 4 above, in cooperation with regional or local communities and interested parties from the economic and social spheres.

7. Member States may consider the possibility of using financial resources provided through the Community's Structural Funds in order to facilitate the development of activities with a European dimension by universities.

Action 2
EUROPEAN UNIVERSITY
NETWORKS

1. The Community will lend its support to the establishment of Community university networks for specific themes, disciplines or fields of higher studies and for any other joint objective. The thematic networks will mainly be made up of departments or faculties of the universities involved in inter-university cooperation programmes which will be encouraged to forge links in a specific area of study, providing its members with a framework for pan-European discussion and planning which will enable them to exchange their experiences and spread their knowhow, as well as discuss the qualitative and innovatory aspects of higher education, improvements in teaching methods and the comparability of curricula.

This sharing of the considerable intellectual capital existing in the universities (in terms of their ability to analyse and innovate, and as sources of expertise and knowledge) will thus contribute to the fulfilment of the objectives of the European Union.

More specifically, the activities for which the thematic networks will be able to apply for Community support are as follows:

- evaluation of curricula for specific disciplines;
- design of joint programmes and specialised courses;
- scientific analysis and reflection on a specific area of studies;

— information services for network members.

2. Network activities relating to the design of joint programmes and specialised courses should be developed between several universities participating in these networks.

3. One of the participating universities should act as a coordinator for activities in each network.

2. Network activities relating to the design of joint programmes and specialized courses should be developed between several universities participating in these networks; attention shall be paid to ensuring equitable participation by universities in less-favoured regions.

4. The Community shall encourage a balanced distribution of networks between the various disciplines, regions and universities

Action 3

Financing of mobility grants for students

1. The Community will continue to develop a system of direct financial aid to students who complete a period of study in another Member State and who fulfil the conditions set out in Action 1, paragraph 3 of this Chapter.

2. The Community funds contributing to students' mobility grants will be shared out between the Member States according to the following formula: subject to budget availability, a minimum sum of 200 000 ECU will be allocated to each Member State. The remainder will be allocated depending on the total number of students at university, as defined in Article 2 of the Decision, and the total number of young people between 18 and 25 in the various Member States, the average cost of travel between the country of origin and the host country and the difference in the cost of living between the country of origin and the host country.

Furthermore the Commission will take any measures necessary to encourage balanced participation between various disciplines, to take account of the flows of students and deal with specific problems such as the financing of some grants which, due to the structure of the programme of study, cannot be managed by the competent authorities mentioned in paragraph 3 below. The funds set aside for these measures may not exceed 5% of the annual budget for students' grants.

3. The Community funds shared out as mentioned in paragraph 2 above and intended for students grants will be administered by the national authorities (NGAA - national grant awarding agencies) established by all the Member States in the framework of the ERASMUS programme. These authorities shall ensure coordination with the national systems of student grant/loans or other financial resources intended to encourage mobility of students. The NGAAs may, in cooperation with the Commission, take action to ensure an equitable participation of universities or faculties at the national or regional level.
4. The Community grants are intended to defray part of the additional costs incurred by mobility, that is, cost of travel, any preparatory language training which might be required and a higher cost of living in the host country. These grants may not exceed 5 000 ECU per student for a maximum of 12 months abroad.
5. Priority will be given to students who follow courses in activities supported under the terms of Action 1. In exceptional cases grants may be allocated to other students attending courses for which special provisions are made outside university cooperation programmes (free movers) as long as they satisfy the eligibility criteria mentioned in Action 1 paragraph 3.
6. Priority in allocating Community grants is given to students who require financial aid, bearing in mind the principle of equality of opportunity, particularly between men and women. The specific needs of disabled students should be taken into consideration when the amount of grant is determined.

7. As the Community's contribution only covers part of the costs of students' mobility, Member States are invited to help provide the necessary funds. Grants or loans available to students in their own country should continue to be paid in full during the period of study in a host Member State.

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CHAPTER II

SCHOOL EDUCATION

1. This chapter presents three actions intended to encourage:

- cooperation between nursery, primary and secondary schools and the establishment of networks;
- schooling of the children of migrant workers and gypsies;
- updating of skills of educational staff in charge of teaching, guidance and/or psycho-pedagogical care of school children and their families.

- promotion of the intercultural dimension of learning and improvement of the quality of education for the children of migrant workers, children of gypsies and children of occupational travellers;

These activities are based on the experience of implementing the LINGUA Community programme, and pilot projects undertaken in the areas of primary and secondary education, as well as those focusing on the introduction of information and communication technologies in education.

They are also based on experience with European schools and Community activities to provide schooling for the children of migrant workers and gypsies.

2. The Community funds aimed at promoting Actions 1.A and 3 in Chapter II will be shared between the Member States according to the following formula: subject to budget availability, a minimum of 200 000 ECU will be allocated to each Member State. The remainder will be allocated to various Member States depending on the total number of children attending school, the number of schools, the number of teaching staff and the ratio between the gross domestic product of each Member State and the Community average.
3. The Community funds for Action 1.A and 3.2 shared out according to the formula mentioned in paragraph 2 above will be managed by the national authorities designated in each Member State. These authorities may, in collaboration with the Commission, take action to promote equitable participation of schools at national or regional level.

4. The Commission will take any measures necessary to encourage equitable participation by schools in the Member States. The funds for these measures may not exceed 5% of the annual budget for financing the activities described in Chapter II.
 5. The Community financial aid provided for in Chapter II is intended to defray part of the costs deemed necessary for implementing the projects.
 6. Community funds are awarded according to the principle of equality of opportunities, especially between men and women. The specific needs of disabled persons participating in the activities developed in the framework of this chapter should be taken into consideration when the level of grant is agreed.
4. The Commission, where necessary in cooperation with the Member States, will take any measures necessary to encourage equitable participation by schools at Community, national and regional level. The funds for these measures may not exceed 5% of the annual budget for financing the activities described in Chapter II.

ACTION 1

COOPERATION BETWEEN SCHOOLS

A. Partnerships

1. The Community shall encourage the development of multilateral partnerships between schools which are built around the concept of the European Education Project (EEP).

A multilateral partnership is a group of at least three institutions from three Member States; one of the institutions shall act as the coordinator. The partnership might be bilateral if the aim is solely to promote knowledge of languages of the Community which are less widely used and taught.

Consideration shall be given to cooperation programmes for intercultural and language teaching involving European schools and schools within national educational systems which are geared towards disseminating the educational experiences of the European schools.

A European Education Project comprises a set of educational activities and measures intended to promote themes of mutual European interest. These activities, forming an integral part of the schools' curricula and conducted jointly by partner schools in other Member States, may include the following, amongst others:

- the development of activities which increase pupils' involvement in subjects of mutual European interest such as the promotion of knowledge of the languages of the Community, its cultural heritage, protection of the environment, artistic education, and the promotion of scientific and technological culture;

- the mobility of school children, particularly for those participating in partnerships where the aim is to improve knowledge of languages;

- the development of activities which increase pupils' involvement in subjects of mutual European interest such as the promotion of knowledge of the languages of the Community, its cultural heritage, environmental awareness and, in particular, knowledge about protection of the environment, artistic education, and the promotion of science and technology;

- joint development and distribution of teaching materials;
- development of innovatory teaching methods.

2. Financial aid may be allocated for visits to prepare partnerships and for exchanges of staff between schools to support partnerships and to develop European Education Projects.

It will be granted for a maximum period of 3 years initially, subject to periodic review. Financial assistance may also be given to groups of schools at the regional, cross-border or other level, which intend to develop jointly particular activities mentioned above.

3. Promotion of the inclusion of the equal opportunities issue in education and training curricula

Consideration shall be given to projects which:

- promote the inclusion of the equal opportunities issue in textbooks, updating courses and other training programmes for teaching staff;
- eliminate sexual stereotypes from textbooks and courses;

aim to prepare and implement pilot programmes on diversification of choice of employment and the training of boys and girls, men and women in view of their rôle in the family and in society;

3. The following priority criteria shall be used for the disbursement of Community funds in support of projects submitted by the partnerships:

- the learning of the languages of the Community, particularly those which are less widely used and taught;
- wider knowledge and understanding of European cultures;
- the integration of issues of Community interest with a horizontal link such as environmental education and health education;
- innovative elements aiming particularly to improve the level of achievement of all school children;
- schools with a significant number of pupils disadvantaged for cultural, physical, geographic, or socio-economic reasons.

4. The following priority criteria shall be used for the disbursement of Community funds in support of projects submitted by the partnerships

- schools with a significant number of pupils disadvantaged for cultural, geographic, or socio-economic reasons or concerned with the education of disabled pupils.

Competitions and incentives : The Community shall organize competitions for pupils in subjects relating to the common cultural heritage, such as modern and classical languages, history, art and music, in agreement with the Member States and in cooperation with the networks, with the aim of activating the individual's capacity for intercultural communication. Pupils will take part in such competitions in multinational working groups.

B. European School networks

1. A network is a group of partnerships as described above, which has been formed in the same thematic field. The role of the networks is to facilitate exchange of experience, to contribute to improving teaching methods and to raise the profile of the partnerships' activities in order to multiply their effect and publicise their achievements. One of the partner schools should coordinate the activities of each network.
2. Financial assistance may be allocated for conducting certain network activities such as:
 - exchanges of information and experience;
 - pooling and improvement of teaching methods, including those using new information and communication technologies;
 - production of teaching materials, including multimedia material;
 - dissemination of good practice to interested persons;

ACTION 2

PROMOTION OF SCHOOLING OF CHILDREN OF MIGRANT WORKERS AND GYPSIES

Financial assistance may be allocated to projects aiming to:

- promote the integration of and equal opportunities for children of migrant workers and gypsies;
- improve their schooling and the quality of the education they receive;
- meet their specific educational needs and exploit their potential.

PROMOTION OF THE INTERCULTURAL DIMENSION OF EDUCATION AND IMPROVEMENT OF THE QUALITY OF SCHOOLING FOR CHILDREN OF MIGRANT WORKERS, CHILDREN OF GYPSIES AND CHILDREN OF OCCUPATIONAL TRAVELLERS

Financial assistance may be allocated to projects aiming to :

- promote the intercultural dimension of education;
- improve the quality of teaching for children of migrant workers, children of gypsies and children of occupational travellers;
- promote equal opportunities for these children and young people;
- contribute to overcoming the obstacles encountered by these children and young people in gaining access to school;
- respond to their needs and their specific educational potential;
- promote educational strategies to combat racism and xenophobia.

These projects, which may be organised either by individual schools or groups of schools at transnational level, may include:

- exchanging information and experience on all aspects mentioned above;
- design of specialised course and teaching material;
- updating the skills of teaching staff and workers particularly involved in actions designed to ensure the successful schooling and integration of these children.

- innovation and/or experimentation with regard to intercultural teaching practices;

The Commission, in cooperation with the Member States, shall encourage the achievement of operational complementarity with the measures financed under the medium-term action programme to combat exclusion and promote interaction.

ACTION 3

UPDATING THE SKILLS OF EDUCATIONAL STAFF

Updating the skills of educators

1. Financial aid may be allocated to transnational projects submitted by institutions engaged in updating the skills of educational staff responsible for the teaching and/or guidance and psycho-pedagogical care of pupils.

These projects are intended to promote:

- the exchange of information and experience, in particular in the area of information and communication technologies;
- the development of teaching methods and materials, especially those adding a European dimension to the updating or acquisition of certain skills for staff, responsible for the teaching, guidance or psycho-pedagogical care of school children and their families;
- the formation of partnerships and networks in the above fields.

2. Projects for updating the skills of staff involved in education may also provide for a limited number of periods to be spent in another Member State so that staff may attend seminars organised jointly by the institutions concerned.

The Community contribution to the travel costs for these staff, shared between the Member States according to the formula described in Chapter II.2, will be paid by the national authorities mentioned in Chapter II.3.

CHAPTER III

HORIZONTAL MEASURES

1. The activities described in this chapter apply at all levels of education. They are intended to promote:

- language skills in the Community;
- open and distance education and learning;
- the broader spread of information and the exchange of experiences in the field of education.

These activities, which will be supplemented by those in the foregoing chapters, will provide a framework for and will constitute a coherent set of measures aimed at:

- supporting those implemented by the Member States;
- supplementing or creating synergies between those presented in the first two chapters.

2. The Commission will take any steps which are necessary to encourage equitable participation by educational institutions in the Member States. The funds for these measures may not exceed 5% of the annual budget for financing the activities set out in Chapter III.
3. The Community financial aid provided for in Chapter III is intended to defray part of the estimated cost of implementing the projects.
4. Community aid shall be awarded according to the principle of equality of opportunities, particularly between men and women. The specific needs of disabled persons who participate in activities developed in the framework of this chapter should be taken into consideration when the amount of grants is agreed.

ACTION 1

PROMOTION OF LANGUAGE SKILLS IN THE COMMUNITY

1. The promotion of language skills is a key factor in establishing the open European area for education and for strengthening understanding and interaction between the peoples of the European Union without sacrificing any of their linguistic and cultural diversity.

These actions will be based on the experience acquired in implementing the LINGUA Community programme.

2. Apart from the measures for encouragement set out in Chapter I, Actions 1 and 2 and in Chapter II, Action 1, Community financial assistance may also be allocated to those transnational projects aiming to undertake the following activities:

- a) the development of European Cooperation Programmes (joint design and creation of innovatory training schemes and teaching materials), submitted by institutions specialising in training language teachers and aiming to update, reinforce and expand the language and teaching skills of present or future language teachers;

- b) immersion courses abroad for language teachers, for teaching staff retraining as language teachers and for teaching staff of other disciplines intending to teach in a foreign language. The duration of these courses will be between two and four weeks.
- c) assistantships abroad for future language teachers to enhance their knowledge of the languages which they will be teaching. These will last not less than 3 months and should be spent in a Member State where one of the official languages is the language which the assistant will be teaching.
- d) design and implementation of curricula, production of new teaching materials for all educational circles, and the recognition of linguistic experience. These projects may also involve the public at large as well as covering language preparation for students and pupils, whether in school or in training centres, to help them take part in mobility schemes.

3. Community funds set aside to promote the activities provided for in b) and c) above will be shared between the Member States according to the following formula: subject to budget availability, a minimum of 200 000 ECU will be allocated to each Member State. The remainder will be allocated depending on the total number of students and language teachers, the average cost of travel between the country of origin and host country and the difference in the cost of living between the country of origin and the host country.

The maximum allocation per beneficiary will be 1 500 ECU for immersion courses and 5 000 ECU for assistantships.

4. Priority will be given to projects and activities:

- relating to the teaching of languages of the Community which are less widely used and taught;
- including the use of new educational technologies.

- designed to promote intercultural learning

ACTION 2

PROMOTION OF INFORMATION AND COMMUNICATION TECHNOLOGIES AND OPEN AND DISTANCE EDUCATION AND LEARNING

The introduction of information and communication technologies and the development of open and distance education and learning are key factors enabling citizens of the Community to take advantage of the open area for education.

These areas contribute to educational quality by making use of teaching innovations and helping to increase access to every level of education, especially for those who, because of their geographical situation or personal circumstances, are not in the position to follow the kind of teaching that requires their constant physical presence.

Information and communication technologies, in addition to open and distance education and learning, is applicable at all levels of teaching, and the use of such facilities may have considerable multiplier effects on the development of the activities included in the Community action programme "SOCRATES".

The following activities may benefit from Community financial assistance:

1. Transnational projects aiming to: improve the quality of products in order to adapt them more precisely to the needs of their users; design and preparation of courses and materials aimed at all citizens and/or adapt them in the languages and to the cultures of the Community; widen the recognition of diplomas, credits and qualifications obtained through open and distance teaching. More specifically:

in the area of higher education, the universities will be encouraged to develop, through means of partnerships with universities specialising in open and distance teaching, activities aiming to bring a European dimension to all higher education subjects. A limited number of mobility grants will be awarded, according to the procedures outlined in Chapter 1, Action 3, to students registered on distance education courses in order that they may visit other Member States to follow intensive courses in the framework of cooperation agreements concluded between competent institutions.

at school level, schools will be encouraged to introduce the use of information and communication technologies, including the opportunities offered through open and distance education and learning, in order that, in particular, achievements and experiences of partnerships may be widely disseminated, benefitting schools not directly participating in the projects. As regards the updating of skills for all staff involved in education, the opportunities offered by open and distance education are of considerable importance, given the vast numbers of such personnel and the need for specific training in aspects concerning the European dimension.

in the other fields included in this programme, and especially for the promotion of language skills, open and distance education and learning may be able to contribute most effectively to the devising and preparation of teaching material which is then accessible to all citizens of the Community.

2. Networks of resource centres for multimedia, open and distance education and for the introduction of the new information technologies as applied to education.

ACTION 3

PROMOTION OF INFORMATION AND EXCHANGE OF EXPERIENCE

Information improves mutual understanding and provides a vital platform for Community cooperation in education and the development thereof. It also provides everybody involved in education with the key to exploiting the potential and enjoying the benefits of an open European area for education.

Information improves mutual understanding and provides a vital platform for Community cooperation in education and the development thereof. It also provides everybody involved in education with the key to exploiting the potential and enjoying the maximum benefits of an open European area for education, as part of an ongoing learning process.

In the framework of SOCRATES programme information centres set up by the authorities responsible in each Member State, the Commission may support activities giving information about the programme at relevant levels (regional, educational authority, or other).

The measures outlined below will equip decision makers and educators with an up-to-date and reliable information service. The activities are based on the experience acquired by the EURYDICE network, the NARIC network, through the ARION programme and Action 4 of the ERASMUS programme.

1. Exchanges of information (EURYDICE)

Action taken in this field will ensure that information is available on educational systems and policy, reforms, innovations and the results of research in education.

The following activities will be eligible for financial assistance:

- a) pooling and production of documents, data and comparative analyses on themes of mutual interest and tools facilitating better comparison of information;
- b) dissemination of such information through existing public and private information and distribution channels and relays at national, regional and Community level;
- c) creation of Community data bases, development of close links between existing data bases and improving access to them;
- d) use of new information processing and electronic technologies to ensure that exchanges are interactive and that there is more efficient sharing of resources. Activities attracting aid will take account of Community developments in the field of trans-European networks, especially telematic links between government departments.
- e) studies to analyse trends and anticipate requirements in the field of education, and any other forward-looking study on education and its socio-economic environment (activities similar to those conducted by observatories).

The Member States will designate the organisations helping to implement the above activities. These will act as interfaces with sources of information on education and existing expert knowledge on education at national level. The Community may lend additional support to these organisations.

When these activities are being implemented close links will be developed with comparable activities of CEDEFOP in the field of information on vocational training, with EUROSTAT in the field of statistics, with the Community network of NARICs (information centres on the academic recognition of awards) and any other information network in the field of education at national European and international level.

2. Study visits ("ARION"-type measures)

Grants may be awarded for the organisation of multilateral study visits for all staff involved in education. These are intended to facilitate exchanges of information and experience on themes of mutual interest to the Member States, and between educators likely to induce a multiplier effect in the Member State.

In this context of this action, staff involved in education means persons whose duties include management, assessment, training, guidance and coordination of European projects and people in responsible positions in the Ministries.

The Community funds set aside to help to organise these visits will be shared between the Member States according to the formula described in Chapter II.2 and administered by the same national authorities indicated in Chapter II.3.

(n/a in English version)

The average grant per beneficiary is estimated at 900 ECU for one week.

3. COMPLEMENTARY MEASURES

The Commission will also lend its support to the following complementary measures intended to further the programme objectives:

- projects developed at European level by associations of teaching staff, students, and parents of school children;
- projects aimed at expanding the European dimension of education and training submitted by organisations responsible for the education of adults, in order to raise awareness of the European dimension of certain issues in the widest possible number of citizens; in particular through supporting the promotion of cooperation and exchange of experience and transnational activities in this field, and especially where these benefit those Member States where the education of adults is insufficiently developed.
- projects developed at European level by associations of teaching staff, students, and parents of school children;
- organisation of awareness-raising activities to promote cooperation in the field of education and training;
- activities concerned with monitoring and evaluation of the actions described in this Annex.

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