

**Interim report to BFUG9 (Helsinki, 12 & 13 October 2006)  
From the Working Group Portability of Grants and Loans**

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***This interim report is meant to illustrate the progress of the work to the BFUG.***

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The Working group on portability of grants and loans first got together on June 16<sup>th</sup>, 2006 in The Hague, The Netherlands<sup>1</sup>. At this meeting it was decided to, during phase 1 as mentioned in the WG proposal<sup>2</sup>, to work in three different sub groups:

- EU-law in relation to portability;
- Descriptions of national student support systems;
- Best practise of countries that already have portability;

During the second Working group meeting in Glasgow, Scotland on September 7<sup>th</sup> and 8<sup>th</sup>, the three sub-groups reported back on their progress from Phase 1 (June to September 2006).

The 'EU Law' group report included:

- There are no explicit barriers to portability in EU-law;
- There is no 100% certainty in EU-law: current or future 'test' court cases could have an impact;
- Robust residency requirements are essential: portability is hardly feasible without residency requirements. These requirements must be the same for nationals as for foreigners to be in compliance with EU-law;

The 'Descriptions' group report included:

- Different countries have different reasons for implementing full, partial or conditioned/targeted portability. Even though the different systems are not alike, the information required is similar: age, income, achievement, recognition of institution, etc.
- The purpose of the recommended joint actions should be to facilitate each other in exchanging the needed information. The question remains how to obtain this information? Are there restrictions only in the practical sense (the information simply not being available) or are there also restrictions in the legal sense: what are countries allowed to give & what are they allowed to ask? Can these exchange best take place on bilateral or multilateral level?

The 'Good Practice' group report included:

- Highlighting national/international level information sharing between organisations involved in portability whether government and central agency or local authority / institutional delivery model as good practice
- Highlighting data protection laws and comparability of qualifications as potential issues; data protection is an issue when exchanging data on individual persons and should be closer looked into

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<sup>1</sup> Minutes

<sup>2</sup> Proposal / Terms of Reference

- Recommending continued collaboration between Bologna countries for international exchange of information on institutions, qualifications and available funding to support administration of portability and reduce double funding

During the meeting in Glasgow it was decided upon how to carry out phase 2, as described in the Working group proposal (from September 2006 to January 2007). The information gathering stage for the working group has been completed in phase 1. A smaller task force is now taking forward the formulation of an outline report, which is intended to provide recommendations and guidance for Ministers<sup>3</sup>. More specifically the guidance will provide advice on joint actions and examples of good practice and what issues / barriers they would need to consider should a country implement portability. Also, the guidance will provide advice on how countries can facilitate other countries' portability, even though the country itself is not yet implementing portability.

The joint actions at this point should be ambitious but at the same time they must be realistic. The Working group concluded that this implies that, based on the gathered information, for now, the most important facilitation of data exchange should be related to:

- avoiding double claims;
- obtaining information about national institutions that recognise the level of university/education;
- creating a list of relevant student support organisations / contact persons in each country;

It is at this point not feasible to provide a set model (toolkit) that will fit all Bologna countries.

In the process of writing up the report, the working group as a whole will still be consulted. If necessary, the task force may meet around November. The next meeting of the full group will take place mid January, in Berlin, Germany. A draft outline of the report is at this moment in progress. A draft report will be presented to the BFUG half February (and might be presented to the Board half January).

The outcome of the Working group should be presented in the (draft) London Communiqué.

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<sup>3</sup> The following countries are represented in the task force: The Netherlands, Scotland, Sweden, Denmark, England and Romania (possibly ESIB).