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Methodological manual on learning mobility in tertiary education

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INTRODUCTION

Learning mobility in higher education¹ is at the top of the political agenda in the European Union as well as in the Bologna area. Monitoring learning mobility in higher education calls for regular collection of reliable and comparable data. The purpose of this Methodological manual is to provide guidance for **national data providers** when providing data on learning mobility in tertiary education. By defining the scope and the types of learning mobility in higher education, this Methodological manual aims at ensuring that all national data providers apply the same concepts. This would ensure the comparability of data on learning mobility in higher education between countries. This Methodological manual also aims at informing **users** of the data about the concepts and the methodology used for interpreting data about learning mobility in higher education.

The Methodological manual details the definition and scope of learning mobility in tertiary education (chapter 1), further defines the EU benchmark on learning mobility in tertiary education (chapter 2) and specifies additional data needs as expressed by EU policy-makers regarding learning mobility statistics (chapter 3). The annex treats the concept of 'prior education' in relation to alternatives.

1 CHAPTER 1: DEFINITION AND SCOPE OF LEARNING MOBILITY IN TERTIARY EDUCATION

The first section of this chapter defines learning mobility and the second section specifies the reference population of learning mobility statistics. The third and the fourth sections detail the concepts of degree mobility and credit mobility respectively. The fifth section presents the geographical scope of learning mobility statistics in tertiary education.

1.1 Definition of learning mobility in tertiary education

It has generally been accepted that the physical crossing of national boundaries between two learning systems is a key element of learning mobility. Therefore, learning mobility in tertiary education has been defined as the **physical** crossing of national borders between a country of origin and a country of destination and subsequent participation in activities relevant to tertiary education (in the country of destination).

The change between different (sub-) national learning systems which does not involve the physical crossing of a national boundary is not considered as learning mobility. This rule applies especially to the following cases:

- the enrolment in distance learning programmes (which may be provided via e-learning) offered by institutions based in a country different from the one where the learner is based²,
- the enrolment in programmes offered by foreign-based institutions in the home country of students and leading to foreign degrees (transnational education)³,

¹ Higher education is here to be considered as levels 5, 6, 7 and 8 of the ISCED-2011 classification. The term Higher education is therefore used interchangeable with the term 'tertiary education' in this manual.

² Students from country A who are enrolled and graduate from distance learning programmes in institutions of country B should be reported in the general student/graduate population by country B.

- the enrolment in programmes offered by subnational learning systems (e.g. in Belgian Communities) where there is no physical crossing of a national border.

Mobile students/graduates, regardless of their citizenship, are defined by their country of origin. **The country of origin** is defined as **the country of prior education i.e. country where upper secondary diploma was obtained**⁴. If the information on country of upper secondary diploma is not available, the country of prior residence can be used as a proxy. Citizenship is the least preferred option as a proxy of country of origin⁵. Before 2016, data on mobile students/graduates shall be provided using the national definition of “country of origin” (preference to prior education, vs. residence, vs. citizenship). Starting in 2016, the definition of country of origin to be used should be the country where the upper secondary diploma was awarded or the best national estimate.

1.2 Reference population

Students/graduates in tertiary education constitute the reference population for learning mobility statistics described in this manual. This reference population encompasses:

- Students/graduates in **formal education** as defined in the ISCED 2011⁶: “*education that is institutionalized, intentional, planned through public organizations and recognized private bodies and, in its totality, makes up the formal education system of a country. Formal education programmes are thus recognized as such by the relevant national educational authorities or equivalent, e.g. any other institution in co-operation with the national or sub-national educational authorities ...*” (§36).
- Students/graduates in **tertiary education**: the statistical recording of learning mobility is possible only through its result which can be described as participation in a tertiary-level study programme in a country different from the country of origin (country of prior education). **Tertiary-level study covers** programmes classified in ISCED levels 5, 6, 7 or 8 according to the ISCED 2011 classification.

There are two types of mobility: degree mobility (section 1.3) and credit mobility (section 1.4).

1.3 Degree mobility

1.3.1 Degree mobility: definition

³ Transnational education is education offered in country A by an institution based in country B. It leads to degrees of country B or joint degrees. This means that students in transnational education study for a foreign degree without having to cross a national boundary.

⁴ ISCED level 3 or 4 completion with access to tertiary education programmes.

⁵ The country of upper secondary education is preferred since it gives the focus on learning mobility. Citizenship is not adequate to measure student mobility since it captures immigration. Moreover, the differences regarding the acquisition of citizenship between countries hamper the comparability of data (for more information, see Section 4.2). Also, the comparison of Eurostat data on inward degree mobility and foreign students showed that the numbers of students with foreign citizenship are higher than the numbers of inward degree mobile students. Therefore, citizenship is considered to be the least preferred option for defining the country of origin in the transitory period before 2016 and not a good basis for the best national estimate of the country of upper secondary diploma after 2016.

⁶ For more details, please see the ISCED 2011 classification available on the UIS website at <http://www.uis.unesco.org/Education/Pages/international-standard-classification-of-education.aspx>

Degree mobility is defined as the physical crossing of a national border to enrol in a degree programme at tertiary-level in the country of destination. The degree programme would require the students' presence for the majority of courses taught.

Degree mobile students are enrolled as regular students in any semester/term of a degree programme taught in the country of destination, which is different from their country of origin ((preference to prior education, vs. residence, vs. citizenship) with the intention of graduating from the programme in the country of destination (see section 1.3.2).

Degree mobile graduates are graduates whose country of origin (preference to prior education, vs. residence, vs. citizenship) is different from the country where the graduation at the given tertiary ISCED level is obtained.

1.3.2 Degree mobility: reference population

Tertiary degree mobile students/graduates are students/graduates:

- in **formal education** as defined in the ISCED 2011 classification (§36);
- in a **tertiary-level study programme**. **Tertiary-level study** covers programmes classified in ISCED levels 5, 6, 7 or 8 according to the ISCED 2011 classification;

AND

- having received the leaving certificate of their **upper secondary programme** (ISCED level 3 or 4 completion with access to tertiary education programmes) in a country different from the one where their institution of tertiary degree study/graduation is located.

The country where they received their upper secondary leaving certificate is defined as their **country of origin** and the country where the tertiary programme is provided is the **country of destination**.

1.3.3 Implementation of the definition of degree mobility

The degree mobility is measured within each tertiary ISCED level (ISCED levels 5 to 8 according to the ISCED 2011 classification) in relation to the country of origin i.e. country where upper secondary diploma was awarded or the best national estimate⁷. The country of origin should be by preference defined as a country where upper secondary diploma was awarded. This allows having a stable reference point throughout the whole tertiary studies including at the time of graduation/qualification. It means that the country of origin remains unchanged during the whole tertiary education of a student/graduate (irrespective of whether a student/graduate changes her/his country of tertiary study) while the mobility status of the student/graduate can change during his/her tertiary education. See examples in Figure 1 below.

It is worth mentioning that this implies that the mobility between tertiary ISCED levels, for example between ISCED level 6 (Bachelor or equivalent) and 7 (Master or equivalent) cannot be directly measured, but only in relation to the country of upper secondary education as illustrated in scenario in Figure 1.

⁷ If the information on the country where upper secondary diploma was awarded is not available, the best national estimate could be based by preference on prior residence. Citizenship as the proxy for country of origin must above all be avoided. For more details see Chapter 4 Annex I.

The advantage of using the concept of prior education at upper secondary level is in this respect that no other additional concepts are needed for defining the mobile student. It would be necessary to add other concepts if, for example, mobility would be measured in relation to each level within tertiary education. In this case a 'returning' student to his country of origin had to be defined through additional criteria such as nationality.

Figure 1: Different scenarios and related degree mobility status

1	COUNTRY A	COUNTRY B	COUNTRY C	Reference year	Mobility status in reference year
ISCED LEVEL 3 or 4	X			T	Country of graduation: A
ISCED LEVEL 5		X		T + x	Country of graduation: B. Tertiary degree mobile graduate at ISCED level 5. Country of upper secondary diploma: A.
ISCED LEVEL 6		X		T + xx	Country of graduation: B. Tertiary degree mobile graduate at ISCED level 6. Country of upper secondary diploma: A.
ISCED LEVEL 7		X		T + xxx	Country of graduation: B. Tertiary degree mobile graduate at ISCED level 7. Country of upper secondary diploma: A.

2	COUNTRY A	COUNTRY B	COUNTRY C	Reference year	Mobility status in reference year
ISCED LEVEL 3 or 4	X			T	Country of graduation: A
ISCED LEVEL 5		X		T + x	Country of graduation: B. Tertiary degree mobile graduate at ISCED level 5. Country of upper secondary diploma: A.
ISCED LEVEL 6		X		T + xx	Country of graduation: B. Tertiary degree mobile graduate at ISCED level 6. Country of upper secondary diploma: A.
ISCED LEVEL 7			X	T + xxx	Country of graduation: C. Tertiary degree mobile graduate at ISCED level 7. Country of upper secondary diploma: A.

3	COUNTRY A	COUNTRY B	COUNTRY C	Reference year	Mobility status in reference year
ISCED LEVEL 3 or 4	X			T	Country of graduation: A
ISCED LEVEL 5		X		T + x	Country of graduation: B. Tertiary degree mobile graduate at ISCED level 5. Country of upper secondary diploma: A.
ISCED LEVEL 6		X		T + xx	Country of graduation: B. Tertiary degree mobile graduate at ISCED level 6. Country of upper secondary diploma: A.
ISCED LEVEL 7	X			T + xxx	Country of graduation: A. Non degree mobile graduate at ISCED level 7. Country of upper secondary diploma: A.

4	COUNTRY A	COUNTRY B	COUNTRY C	Reference year	Mobility status in reference year
ISCED LEVEL 3 or 4	X			T	Country of graduation: A
ISCED LEVEL 5		X		T + x	Country of graduation: B. Tertiary degree mobile graduate at ISCED level 5. Country of upper secondary diploma: A.
ISCED LEVEL 6		X		T + xx	Country of graduation: B. Tertiary degree mobile graduate at ISCED level 6. Country of upper secondary diploma: A.
ISCED LEVEL 7	X			T + xxx	Country of graduation: A. Non degree mobile graduate at ISCED level 7. Country of upper secondary diploma: A.
ISCED LEVEL 8			X	T + xxxx	Country of graduation: C. Tertiary degree mobile graduate at ISCED level 8. Country of upper secondary diploma: A.

The different scenarios and related degree mobility status presented in the above examples apply also to degree mobile students enrolled.

1.3.4 Degree mobility: specific issues

Particular cases regarding degree mobility should be treated according to the same criteria as all other students/graduates. There is no need to identify them separately. They are only listed here to eliminate any doubt about their treatment.

- In case a student completed upper secondary education in two countries, the last graduation should be taken into account. For example, a student who has completed the upper secondary education in Ireland and who has just graduated again at ISCED 2011 level 3 or 4 (upper secondary general programme) in the United States before entering a tertiary education programme in the United States should not be deemed as degree mobile in the US. He/she will be so if he comes back to Ireland for tertiary education.
- Mobile students/graduates with home nationality (i.e. '*Homecoming nationals*') – students/graduates who are citizens of the destination country but received their prior upper secondary certificate abroad – should be classified as mobile students/graduates. In other words, and more generally, citizenship has nothing to do with the mobility status.
- Students/graduates at campuses of foreign institutions (transnational education) should be classified as mobile students according to the same criteria as students/graduates enrolled in national educational institutions.
- As usual residence is not the determining criteria to define degree mobility; “commuters” should be considered as degree mobile if they study at tertiary level in a different country from the one where they were awarded their upper secondary leaving certificate.
- Degree mobile students/graduates may have started their programme in their country of origin and have the credits awarded by the institution in their country of origin recognized abroad.
- Students/graduates in distance education programmes with upper secondary education abroad do not qualify as mobile students/graduates. Distance education is characterized by the fact that less than half the teaching is provided face-to-face. The remaining teaching may be provided online in the form of e-learning.

1.4 Credit mobility

1.4.1 Credit mobility: definition

Credit mobility is defined as temporary tertiary education or/and study-related traineeship abroad within the framework of enrolment in a tertiary education programme at a "home institution" (usually) for the purpose of gaining academic credit (i.e. credit that will be recognised in that home institution).

Graduates who have had a credit mobility stay are graduates from a given tertiary ISCED level programme who have had a temporary tertiary education study period and/or work placement abroad within the ISCED level programme.

1.4.2 Credit mobility: reference population

Tertiary credit mobile graduates are graduates:

- in **formal education** as defined in the ISCED 2011 classification (§36);
- in a **tertiary-level study programme**. **Tertiary-level study covers** programmes classified in ISCED levels 5, 6, 7 or 8 according to the ISCED 2011 classification;

AND

- who spend an education and training period in a country different from their country of full registration/graduation (i.e. the country where they are regularly enrolled/obtain their diploma) in the perspective of making those credits gained abroad recognised in the institution of full registration (“home institution”). This period of tertiary level study or training abroad should **take place during the ISCED tertiary level programme from which the student graduates** and should **be recognised towards a degree by the home institution**.

The tertiary education programme at the home institution and the tertiary education programme at the host institution have to fall within the scope of formal education, to be documented in the ISCED mapping (and allocated to ISCED 5, 6, 7 or 8 of the ISCED 2011 classification) and lead to a degree which is recognised within the educational system and the labour market.

Credit mobility mostly involves participation in academic lessons, but it can also take other forms, such as work placement/internships/traineeships⁸ provided that they are relevant to the study programmes in which the students are enrolled at their home institutions, done for the purpose of contributing to the qualification and recognized by the home institution. This implies that work placement/internship/traineeship periods that are not recognised as part of a formal tertiary education programme should not be considered as credit mobility. After the mobility phase, students are expected to return to their home institution to complete their programme there.

ECTS is the credit system for higher education used in the European Higher Education Area (EHEA), involving all countries involved in the Bologna Process. It stands for ‘European Credit Transfer System’. *“ECTS credits are based on the workload students need in order to achieve expected learning outcomes. Learning outcomes describe what a learner is expected to know, understand and be able to do after successful completion of a process of learning. They relate to level descriptors in national and European qualifications frameworks. Workload indicates the time students typically need to complete all learning activities (such as lectures, seminars, projects, practical work, self-study and examinations) required to achieve the expected learning outcomes. 60 ECTS credits are attached to the workload of a fulltime year of formal learning (academic year) and the associated learning outcomes. In most cases, student workload ranges from 1,500 to 1,800 hours for an academic year, whereby one credit corresponds to 25 to 30 hours of work”*⁹.

1.4.3 Implementation of the definition of credit mobility

The credit mobility status is measured at each tertiary education ISCED level. A graduate at a given tertiary ISCED level is considered to be credit mobile if the credit mobility stay took place during the given ISCED level. See examples in Figure 2 below.

⁸ At this stage no international definition of traineeship exists. However, it should be emphasised that a distinction exists between (regularly remunerated) work and training/internship. Internship/traineeship refers to work experience, learning on the job, to which a significant element of learning and training is included. The purpose of the traineeship is to help a trainee to adapt to requirements of EU labour market, acquiring specific skills and enhancing of understanding of the economic and social environment of the country concerned, while gaining work experience. Placements in enterprises (e.g. Erasmus work placement) are covered by what is understood as traineeship. It should be borne in mind that traineeship is different from apprenticeship (as defined by CEDEFOP).

⁹ DG EAC - ECTS Users’ Guide

http://ec.europa.eu/education/lifelong-learning-policy/doc/ects/guide_en.pdf

Figure 2: Different scenarios and related credit mobility status

1	COUNTRY A	COUNTRY B	COUNTRY C	Reference year	Mobility status in reference year
ISCED LEVEL 3 or 4	X			T	Country of graduation: A
ISCED LEVEL 5	X	← 4 months or more than 15 ECTS points →		T+x	Country of graduation: A. Tertiary credit mobile graduate at ISCED level 5. Country of destination of credit mobility is country B.
ISCED LEVEL 6	X	← 4 months →		T+xx	Country of graduation: A. Tertiary credit mobile graduate at ISCED level 6. Country of destination of credit mobility is country B.
ISCED LEVEL 7	X	← 4 months →		T+xxx	Country of graduation: A. Tertiary credit mobile graduate at ISCED level 7. Country of destination of credit mobility is country B.
ISCED LEVEL 8	X	← 6 months →		T+xxxx	Country of graduation: A. Tertiary credit mobile graduate at ISCED level 8. Country of destination of credit mobility is country C.
2	COUNTRY A	COUNTRY B	COUNTRY C	Reference year	Mobility status in reference year
ISCED LEVEL 3 or 4	X			T	Country of graduation: A
ISCED LEVEL 5	X			T+x	Country of graduation: A. Tertiary graduate at ISCED level 5, non credit mobile .
ISCED LEVEL 6	X	← 4 months or more than 15 ECTS points →		T+xx	Country of graduation: A. Tertiary credit mobile graduate at ISCED level 6. Country of destination of credit mobility is country B.
ISCED LEVEL 7	X			T+xxx	Country of graduation: A. Tertiary graduate at ISCED level 7, non credit mobile .
ISCED LEVEL 8	X	← 6 months →		T+xxxx	Country of graduation: A. Tertiary credit mobile graduate at ISCED level 8. Country of destination of credit mobility is country C.
3	COUNTRY A	COUNTRY B	COUNTRY C	Reference year	Mobility status in reference year
ISCED LEVEL 3 or 4	X			T	Country of graduation: A
ISCED LEVEL 5	X	← 4 months →		T+x	Country of graduation: A. Tertiary credit mobile graduate at ISCED level 5. Country of destination of credit mobility is country C.
ISCED LEVEL 6	X	← 4 months →		T+xx	Country of graduation: A. Tertiary credit mobile graduate at ISCED level 6. Country of destination of credit mobility is country B.
ISCED LEVEL 7		← 5 months → X		T+xxx	Country of graduation: C. Tertiary credit mobile graduate at ISCED level 7 (country of destination of credit mobility: B) but also tertiary degree mobile graduate at ISCED level 7 (country of upper secondary diploma: A).

It is important to mention that graduates that are at the same time degree and credit mobile (see example 3, ISCED level 7, in Figure 2 above) should be identified in order to avoid double counting when computing the total of mobile graduates (see below chapter 2 on the computation on the EU benchmark). For this computation degree mobility takes precedence over credit mobility because the degree mobility stay is longer.

1.4.4 Credit mobility: specific issues

1.4.4.1 Types of activity during credit mobility

Credit mobility covers two types of activities during the stay abroad: ‘study’ and ‘work placement/ internships/ traineeships’ (see Chapter 3 for detailed definitions).

1.4.4.2 Credit mobility: duration of stay

The duration of credit mobility is defined as the total uninterrupted length of stay abroad. It includes:

- the duration of the period when studying for credit;
- the duration of the work placement/ internship/ traineeship; and

- any other study recognized as part of formal tertiary education programme¹⁰ that took place abroad in conjunction with this study period.

When the stay abroad combines study and work placements/ internships/ traineeships, the total duration of both activities for the purpose of contributing to the qualification should be considered provided that in both cases the stay is recognized by the home institution.

When the duration of credit mobility is not available in terms of months, then ECTS credit points are relevant to determine the length of stay abroad¹¹. It is important to note that the length of the stay to be considered is the length in a row. In case of multiple stays abroad, only the longest one should be taken into account (see item ‘multiple credit mobility’ below). This rule applies also to joint and double degrees (see item below)¹².

1.4.4.3 *Types of credit mobility schemes*

Credit mobile students could be classified by **type of mobility scheme**. Organised mobility programmes and especially EU student mobility programmes are in all likelihood responsible for a significant amount of credit mobility in Europe. Data on credit mobility cover the following types of mobility schemes (for a more detailed description please see Chapter 3):

- Credit mobility under EU programmes; this means programmes financed by the EU¹³;
- Credit mobility under other international/national programmes; this means bilateral or multilateral programmes not financed by the EU (this category includes also partnerships between universities);
- Credit mobility under other programmes; this means credit mobility neither under EU programmes nor other mobility programmes such as ‘free movers’¹⁴.

1.4.4.4 *Programmes that do not award credits*

The fact that an educational programme does **not award ECTS credit** (at ISCED level 8 – Doctoral or equivalent) should not be considered as a limitation, and the duration of stay should be measured in months.

1.4.4.5 *Joint and double degree programmes*

Joint or double degree programmes are programmes jointly developed and implemented by two or more educational institutions resulting in double degree or one single award

¹⁰ Studies that are not recognised as part of a formal tertiary education programme should not be considered as credit mobility.

¹¹ Measurement in months was introduced to allow counting of work placements for which no ECTS credit points are given. However, these work placements need to be an integral part of the study programme.

¹² For more details on the duration of stay, see section 2.2.3

¹³ According to online programme information, LEONARDO (vocational) and GRUNDTVIG (adult education) participation do not fall under formal programmes within ISCED 5 – 8 so that it should not be included in the data sets. For ERASMUS Mundus there is only scholarship information collected.

¹⁴ Free movers are students who organise the recognized mobility stay on their own, but such stay is credited by their home Higher Education Institution. The method of data collection may have an impact on the estimation of ‘free movers’. Due to the specificity of individual arrangements by students, surveys among graduates may give higher results than administrative data coming from institutions.

recognised by all of them. Following the list of characteristics developed in a EUA survey¹⁵, joint degrees are considered degrees with the following characteristics:

- The study programmes are jointly developed and recognised by several institutions.
- Students at participating institutions spend part of their studies at another institution.
- The periods of study and examinations, which were completed at other institutions, are automatically recognised in full at their home institutions.
- The teaching staff of each participating institution works out the curriculum together, formulates regulations for admission and the examination conditions and also teaches at the other institutions.
- Upon completion of the study programme, students receive either national degrees from the individual institutions or a degree which is jointly conferred.

In addition, as stated by the EUA survey *'the award of a single degree in the name of several institutions is still legally difficult. Joint degrees are therefore usually awarded either as a double degree (two separate national qualifications), or as one national qualification with reference to the fact that it results from a joint programme'*.

This is confirmed by the Recommendation on the recognition of joint degrees¹⁶ which states (Art.5) that a joint degree may be issued as:

- a joint diploma in addition to one or more national diplomas;
- a joint diploma issued by the institutions offering the study programme in question without being accompanied by any national diploma;
- one or more national diplomas issued officially as the only attestation of the joint qualification in question.

When joint degrees are provided by institutions in different countries, and as they involve the participation in the educational programmes of different institutions, then students participating in joint degrees could be considered as mobile. However, as learning mobility is defined as *'physical crossing of national borders between a country of origin and a country of destination'*, such students should be considered as mobile only when they have physically crossed a national border in the framework of the joint programme.

The characteristics of joint programmes obviously include aspects of both credit and degree mobility. However, the fact that *'students at participating institutions spend part but not all of their studies at another institution'* suggests that students enrolled in joint programmes should be considered as **credit mobile** and not as degree mobile. Also, this rather rough classification is important to avoid double counting, to ensure data comparability and to facilitate the process of data collection.

¹⁵ EUA, "A Survey on Masters Degrees and Joint Degrees in Europe", September 2002, by Christian Tauch and Andrjes Rauhvargers.

¹⁶ The Committee of the convention on the recognition of qualifications concerning higher education in the European region third session Strasbourg, 9 June 2004

1.4.4.6 *Distance learning*

As for degree mobility, only physical mobility is covered (i.e. distance learners enrolled at an institution abroad are excluded). However, tertiary students enrolled in a distance programme in their country of prior education who physically move abroad to temporarily attend a programme/classes are included in the credit mobile student population.

1.4.4.7 *Multiple credit mobility*

In case a student has had several credit mobility periods, the student/graduate should only be counted once and should be classified according to the following hierarchy:

- **Length of stay:** the stay with the longest duration should be considered;
- **Country of destination:** the country of destination of the longest stay should be considered.

1.5 **Geographical scope**

Mobility involves two countries: the country of origin and the country of destination. The geographical coverage of mobility includes all countries of the world. Additionally, the following areas are defined and disseminated by Eurostat as aggregates:

- **The European Union (EU 28):** Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, and United Kingdom.
- **The European Higher Education Area (EHEA) (47)¹⁷:** the EU members and non-EU EHEA countries (19): Albania, Andorra, Armenia, Azerbaijan, Bosnia and Herzegovina, Georgia, Holy See, Iceland, Kazakhstan, Liechtenstein, FYR of Macedonia, Moldova, Montenegro, Norway, Russian Federation, Serbia, Switzerland, Turkey and Ukraine.

¹⁷ The list of countries available at <http://www.ehea.info/>

2 CHAPTER 2: THE LEARNING MOBILITY IN HIGHER EDUCATION 2020 BENCHMARK (LMHE2020)

This chapter precisely focuses on the Learning Mobility in Higher Education 2020 benchmark (hereafter referred to as LMHE2020). A first section provides the background for the benchmark. A second section is devoted to data needs explicitly expressed in (or derived from) the LMHE2020 formulation from the Council Conclusion. Special issues are reported in the third section and the last section is dedicated to calculation details of the benchmark.

2.1 Background

The Ministers responsible for higher education in 46 countries (47 since 2010) participating in the Bologna Process, including all the EU Member States, and the European Commission agreed in April 2009 at Leuven and Louvain-la-Neuve that:

In 2020, at least 20% of those graduating in the European Higher Education Area should have had a study or training period abroad.

On the 28th of November 2011, the Council followed suit and agreed on a new benchmark for learning mobility¹⁸ referring to two areas, namely mobility in higher education and mobility in vocational education and training. As for mobility in higher education, the benchmark was defined as follows:

“By 2020, an EU average of at least 20 % of higher education graduates should have had a period of higher education-related study or training (including work placements) abroad, representing a minimum of 15 ECTS credits or lasting a minimum of three months” (p. 8).

The Council invited the Commission to

“Work with and support the Member States, in particular with the help of Eurostat, to improve the availability of relevant indicators and statistics during the period up to 2020. In doing so, the best possible use should be made of the statistical data and household surveys available, with a view to minimising administrative burdens and costs.” (p. 5)

“Report back to the Council by the end of 2015, with a view to reviewing and, if necessary, revising the European benchmark on learning mobility (...)”. (p. 5)

The Council invited the Member States, with the support of the Commission,

“With regard to learning mobility in higher education: operating within available resources and in close synergy with the Bologna Process, to improve the collection of data on student mobility (including credit and degree mobility) at all cycles from administrative and other sources - especially at the point of graduation, in order to measure progress against the mobility benchmark (...)”. (p. 5)

Furthermore, the European Higher Education Area (henceforth EHEA) Ministerial Conference held in Bucharest¹⁹ reaffirmed and elaborated its mobility target formulated in Leuven/Louvain-la-Neuve and stipulated that the mobility target includes “*the periods spent*

¹⁸ Council conclusions on a benchmark for learning mobility. 3128th EDUCATION, YOUTH, CULTURE and SPORT Council meeting, Brussels, 28 and 29 November 2011:

http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/educ/126380.pdf.

¹⁹ [http://www.ehea.info/Uploads/\(1\)/Mobility_Strategy_DRAFT%20FOR%20ADOPTION.pdf](http://www.ehea.info/Uploads/(1)/Mobility_Strategy_DRAFT%20FOR%20ADOPTION.pdf)

abroad corresponding to at least 15 ECTS credit points or three months within any of the three cycles (credit mobility) as well as stays in which a degree is obtained abroad (degree mobility). The EHEA Ministerial Conference held in Bucharest also refined further the data needs in the field of learning mobility (see Chapter 3 for details).

The mobility thresholds used for the EU benchmark and the Mobility Strategy 2020 for the EHEA are thus fully harmonised.

2.2 Data needs

In brief, data needs related to the benchmark are on mobility for graduates during their overall period of study in tertiary education. More specifically, as stated at the last EHEA Ministerial Conference, policy makers expressed the need to consider “higher education graduates” by ISCED level (and especially for each of the three cycles of the Bologna Process).

The data requirements in the data collection will concern degree mobile graduates and graduates who have had a credit mobility stay of at least 3 months or 15 ECTS credit points ‘throughout the cycle of their studies’ by ISCED levels 5 to 8 at 1-digit level of detail. The transmission of data at ISCED level 5 at 2-digit level of detail is optional. The details on characteristics and breakdowns required are presented in Chapter 3. The concept of “throughout the cycle” has to be understood as credit mobility in each ISCED level as explained in Chapter 1.

This section details what should be understood by “mobile graduates”, “EU average of higher education graduates”, and “a minimum 15 ECTS credits or minimum 3 months”.

2.2.1 Mobile graduates: two distinct datasets

Mobile graduates to be included in the benchmark cover both degree mobile (as defined in Chapter 1, section 1.3) and credit mobile (as defined in Chapter 1, section 1.4) graduates.

Regarding degree mobile graduates (i.e. whose country of graduation is different from the country of origin), the country of upper secondary certificate or the best national estimate should be used to determine the country of origin. If, for a transitional period, any other criterion is used (e.g. country of prior or permanent residence, or citizenship or the estimation based on the combination of those) this should be clearly mentioned by the data provider: such data will be deemed as estimates of learning mobility.

Regarding credit mobile graduates, it includes any ‘study’ and ‘work placement/internships/traineeships’ as defined in Chapter 3.

In practice the two types of mobility should be collected through two distinct datasets:

- 1) Degree mobile graduates: each country should provide data by ISCED 2011 level on graduates who are degree mobile (i.e. having completed their upper secondary education in another country);
- 2) Credit mobile graduates: each country should provide data on students who graduate in the country and who have had a period of study or training abroad.

All of a country’s domestic educational activities (within its own territory) regardless of ownership or sponsorship of the institution concerned (whether public or private, national or foreign) and the education delivery mechanism are covered.

2.2.2 EU average of higher education graduates: the country of origin breakdown

First, “higher education graduates” refers to graduates within all cycles of higher education or, more generally, each ISCED level in tertiary education (ISCED levels 5 to 8, following the new ISCED 2011 classification).

Second, the population of higher education graduates “at EU level” does not refer to all students graduating in the EU (i.e. EU domestic population of graduates). Instead, it refers to those higher education graduates whose country of origin is in the EU (country of origin as defined in Chapter 1, meaning graduates having got their upper secondary certificate in an EU Member State or the best national estimate).

The second point has important consequences on data: the country of prior education has to be properly identified for all graduates in order to identify those who are mobile and, among them, those who will be included in the calculation of the benchmark.

For example, a tertiary student graduating in the Netherlands with upper secondary education completed outside the EU is degree mobile but will not be counted towards the benchmark because the upper secondary diploma was obtained outside the EU. If that graduate participated in an exchange programme (credit mobile), even in a European programme between two European institutions, his/her participation would also not count towards the benchmark. A tertiary student graduating in the Netherlands with the upper secondary education completed in another EU country (for example Germany) is degree mobile and will be counted towards the benchmark.

2.2.3 Length of stay abroad

The length of stay abroad is crucial for the benchmark calculation, as only those credit mobility stays *representing a minimum of 15 ECTS credits or lasting a minimum of three months* should be taken into account. ECTS credits should be seen as a proxy for the 3 month duration threshold, and as such the emphasis is on the enrolment in courses that give at least 15 ECTS and not on the successful completion of exams. If length of stay is not known then the courses followed should correspond to at least 15 ECTS points.

A second point is that the 3 months (or alternatively 15 ECTS credits) lower limit should be understood as 3 months in a row (or 15 ECTS credits gained in one single stay). Only credit mobility periods of 3 months or more in a row should be considered. For example, a graduate who spent two different periods abroad of 2 months and 1 month successively should not be considered as a credit mobile graduate eligible for the benchmark. More specifically, in case of multiple stays abroad, only the longest one should be taken into account. It is important to note that what should be reported is the number of graduates having been credit mobile (i.e. head counts), not the number of stays abroad.

To conclude, when using credits for reporting credit mobile graduates, considering the university registers of credits gained abroad could be misleading. Therefore, it should be checked that those 15 or more ECTS credits have been awarded at once (in one single stay).

2.3 Special issues

2.3.1 Aggregating credit mobility with degree mobility

As the benchmark covers both types of mobility (degree and credit), a simple sum of credit mobile graduates and degree mobile graduates would lead to a wrong calculation of the

LMHE2020 benchmark. Indeed, graduates who are both degree mobile and credit mobile (dual mobility status) shall be identified in order to avoid double counting.

For the computation of the EU benchmark, it should be considered that when a student graduates in a country different from the country of origin i.e. a graduate is degree mobile, the degree mobility takes precedence over any credit mobility stays within the ISCED level as it is longer in duration (see the example of ISCED level 7 in Figure 3). The number of credit mobile graduates needed to compute the EU benchmark should exclude those that are degree mobile. This is an important aspect that has to be taken into account in the data collection in order to avoid the double counting of graduates who had been degree mobile and had a credit mobility stay.

Figure 3: Scenario with degree and credit mobility and data needed for the EU benchmark

1	COUNTRY A	COUNTRY B	COUNTRY C	Reference year	Mobility status in reference year
ISCED LEVEL 3 or 4	X			T	Country of graduation: A
ISCED LEVEL 5	X	←→	4 months	T+x	Country of graduation: A. Tertiary credit mobile graduate at ISCED level 5. Country of destination of credit mobility is country C.
ISCED LEVEL 6	X	←→ 4 months		T+xx	Country of graduation: A. Tertiary credit mobile graduate at ISCED level 6. Country of destination of credit mobility is country B.
ISCED LEVEL 7			5 months ←→ X	T+xxx	Country of graduation: C. Degree mobility takes the precedence over credit mobility (longer in duration than credit mobility and leading to a degree in Country C) to avoid double counting of student X in the computation of EU benchmark.

2.3.2 Non-availability of data: estimation methods

As to the degree mobility data, the main difficulty in collecting data is to properly identify the country of prior education that should be the country where upper secondary diploma was obtained or the best national estimate. As stated in section 1.1, for a transitional period the use of proxies (country of prior residence, country of permanent residence, country of citizenship or the estimate based on combination of those) is allowed but should be clearly mentioned since such data have to be considered as estimates of learning mobility. In some countries, the number of students/graduates with prior education outside the country is known (the total number of degree mobile students/graduates is available), but not the precise country of prior education. Again, this should be clearly mentioned in the metadata part of the questionnaire.

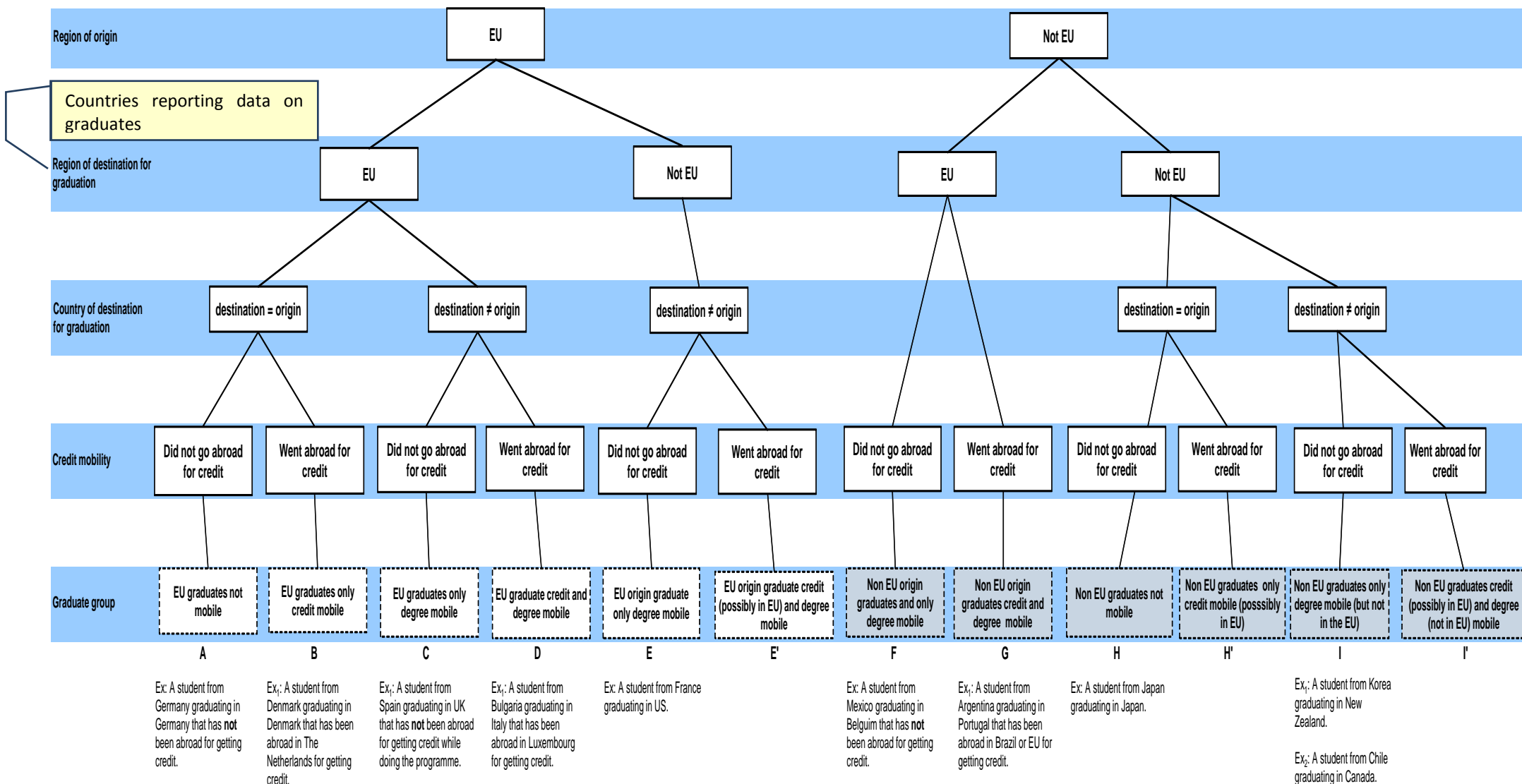
2.4 LMHE2020 calculation details

The benchmark will be computed at the EU level as the number of EU originated mobile graduates (as defined in the benchmark, i.e. either credit or degree mobility categories, with a minimum length of stay abroad: see section 2.2 above) expressed as a percentage of all graduates whose origin (i.e. country of upper secondary diploma) is in the EU:

$$LMHE\ 2020 = \frac{\text{number of EU originated mobile graduates}}{\text{number of EU originated graduates}} \times 100$$

Figure 4 below shows all possible categories of mobile graduates.

Figure 4: Representation of all possible categories of mobile graduates when combining degree and credit mobility



Referring to Figure 4 inventorying all possible groups of mobile graduates, the LMHE2020 may be written as follows:

$$LMHE2020 = \frac{B + C + D + E + E'}{A + B + C + D + E + E'} \times 100$$

The reference population (denominator) is the population of graduates with country of origin in the EU. The numerator is a subset of this population (those qualifying for being deemed as mobile), so that the benchmark is necessarily less than 100%.

The numerator is the total number of graduates with country of origin in the EU who were mobile. It includes those who are exclusively credit mobile – (population B), those who are exclusively degree mobile within the EU (population C) and from the EU to the rest of the world (population E) and those who are dual mobile graduates (populations D and E'). As a reminder (see section 2.3.1 above), those double-status mobile graduates have to be reported for the benchmark, but should be clearly identified in order to avoid to count them twice.

Looking at the source of the data, for the calculation of the LMHE2020 the data on degree mobile graduates with origin in the EU will be also needed from non-EU countries (Figure 5). This will, in principle, require coherence in the definition of country of origin used by non-EU countries (mainly non-EU OECD countries). It will also be necessary to keep a list of non-EU countries included in the calculation of the benchmark stable over the years in order to have meaningful results.

Figure 5: Data and sources needed for the calculation of the LMHE2020

Indicator		Data	Source
Numerator	Degree mobile graduates with origin in the EU	Degree mobile graduates with EU origin who graduate in the EU (C +D)	EU countries
		Degree mobile graduates with EU origin who graduate in non-EU countries (E + E')	Non-EU countries
	Credit mobile graduates with origin in the EU	Credit mobile graduates with EU-origin who are not degree mobile (B)	EU countries
Denominator	All graduates with origin in the EU	All graduates with EU-origin who graduate in the EU (A+B+C+D)	EU countries
		Degree mobile graduates with origin in the EU who graduate in non-EU countries (E+E')	Non-EU countries

In practice, this ratio will be computed for each ISCED level (from 5 to 8). But the final LMHE2020 benchmark will be the overall tertiary education percentage.

3 CHAPTER 3: ADDITIONAL DATA NEEDS REGARDING LEARNING MOBILITY STATISTICS IN TERTIARY EDUCATION

Besides the data used to compute the EU benchmark on learning mobility in tertiary education (chapter 2), policy makers need additional data to analyse and monitor learning mobility in tertiary education in the EU and in the European Higher Education Area (EHEA)²⁰. These additional data needs are detailed in the following sections. The first section of this chapter details the EU and EHEA policy context. Subsequent sections detail additional data needs regarding enrolment data (section 3.2), degree mobility (section 3.3) and credit mobility (section 3.4).

3.1 The policy context

It is acknowledged that learning mobility is at the heart of the European Commission's programmes and initiatives in the area of education and training. Mobility is also at the core of the European Higher Education Area (EHEA).

3.1.1 Council conclusions on a benchmark for learning mobility

The 2011 Council conclusions on a benchmark for learning mobility²¹ recall that "*providing the widest possible access to mobility for all, including disadvantaged groups, and reducing the remaining obstacles to mobility constitute one of the main strategic objectives of EU policy in the field of education and training.*"

It is important to note that although the results for the benchmark itself will be central to monitor progress and foster exchanges of good practices and policy dialogue, there is also a demand for additional breakdowns and indicators to further strengthen the evidence-base in this important area, and better understand differences in mobility levels across countries.

In the 2011 Council conclusions on a benchmark for learning mobility the need for accompanying indicators to the benchmark is acknowledged: "*A European benchmark on learning mobility accompanied by relevant indicators could help to encourage and monitor the progress of Member States towards the already agreed objective of increased mobility, as well as identify examples of good practice and support the development of peer learning initiatives*".

The 2011 Council conclusions on a benchmark for learning mobility also consider that "*Shorter periods may be taken into account for measuring national mobility levels, providing these are recognised by the individual Member State within the context of a quality mobility scheme and are recorded separately*".

3.1.2 The Mobility strategy 2020 for European Higher Education Area

The 2020 strategy "Mobility for Better Learning" adopted by the European Higher Education Area Ministerial Conference (Bucharest 26-27 April 2012)²² clearly points to the need for more detailed mobility data, including a continued need for enrolment data. It specifies that

²⁰ The list of countries available at <http://www.ehea.info/>

²¹ http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/educ/126380.pdf

²² <http://www.ehea.info/Uploads/%281%29/2012%20EHEA%20Mobility%20Strategy.pdf>

“In addition to our quantitative target for the outward mobility of graduates in the EHEA, we now also want to draw attention to mobility into the EHEA such as the number of students enrolled in the EHEA who have obtained their prior qualification outside the EHEA as one possible indicator of its international attractiveness. We invite the European Commission (in particular Eurostat with the collaboration of the European Statistical System and its partners in international organisations) to collect corresponding data so that we can assess the progress in achieving the target for outward mobility and establish a reliable data basis regarding inward mobility with the possible aim of defining a target in 2015.”

Therefore, in support of the specified indicators, we invite the European Commission (Eurostat) to develop and provide data:

- (a) On degree and credit mobility to and from countries outside the EHEA.*
- (b) On the various mobility types (degree and credit mobility), in addition also short-term mobility corresponding to less than 15 ECTS credit points or three months.*

In addition and where applicable, EHEA countries in co-operation with the European Commission and Eurostudent to develop and provide data:

- (c) On mobility of early stage researchers, teachers, and staff in higher education.*
- (d) On the social dimension of mobility.*

Moreover, “In order to be able to better evaluate the development of degree mobility in the EHEA and react in good time to possible negative consequences for certain countries and regions, we intend in future to analyse the mobility flows systematically and regularly.”

3.1.3 Erasmus for All

The importance of mobility is evident in the current Lifelong Learning Programme for education and training the Youth Programme, and even more so in the new *Erasmus for All* programme 2014-2020²³ currently under discussion by the Council (27 Member States) and the European Parliament. Indeed, at this stage, among the three Key Actions of the *Erasmus for All* programme, Key Action 1 is about “learning mobility of individuals”. The *Erasmus for All* support for mobility will focus on four key activities:

- Staff mobility, in particular for teachers, trainers, school leaders and youth workers.
- Mobility for higher education students (including joint/double degrees) and vocational education and training students.
- Erasmus Master for master degree mobility of higher education students, through a new loan guarantee mechanism.
- Youth mobility, including volunteering and youth exchanges.

The aforementioned policies and strategies underpin the need for a wider variety of data compared to the one used for the computation of the EU benchmark. This variety of data includes information on enrolment (section 3.2), further data on degree mobility broken down by sex, country of origin and fields of education (section 3.3) and further data on credit mobility (region of destination, type of mobility, type of mobility scheme and duration of credit mobility and ‘other short term mobility’) (section 3.4).

²³ <http://ec.europa.eu/education/erasmus-for-all/>

3.2 Degree mobile graduates: additional data needs

As detailed in chapter 2 of this manual, the EU benchmark on learning mobility in higher education needs data on graduates of tertiary education. The following data is required on degree mobile graduates:

- Number of degree mobile graduates, by ISCED levels 5 to 8 (1-digit level of detail), country of origin and sex. Transmission of data for ISCED level 5 at 2-digit level of detail is optional.

3.3 Degree mobility: additional enrolments data needs

Despite the EU benchmark on learning mobility in higher education has been defined in terms of graduates, it is still relevant to collect data on the mobility of enrolled students as:

- Enrolment data provides information about the current situation in the education and training systems on a yearly basis, i.e. stock data on mobility.
- When linking enrolment data with data on financing and staff, the impact of enrolled mobile students on cost/student and teacher/student ratios would also be relevant, although this kind of analysis is not yet well developed.

More practically:

- Having a wider set of mobility data allows to maintain more relevant breakdowns than a few on mobility on graduates would allow (it is e.g. suggested to collect the detailed information about mobility by field of study in terms of enrolments rather than adding complexity to the graduates data). Some details may also be more easily available for enrolled students rather than graduates.

In any case, data needs on enrolment would cover the same ISCED levels as data on graduates i.e. ISCED levels 5, 6, 7 and 8 according to the ISCED 2011 classification.

EU policy places an emphasis on the mobility for all, making it relevant to identify imbalances in mobility patterns within EU countries and across countries. Additional data needs regarding degree mobility cover three additional breakdowns, namely sex, country of origin and fields of education:

- **Sex:** this breakdown is used to analyse the gender imbalances of learning mobility within EU countries;
- **Country of origin:** this breakdown is used to analyse geographical imbalances of mobility flows.
- **Fields of education:** this breakdown is used to analyse imbalances between different fields of education and to provide input on discussion about brain drain/gain issues for enrolment data. Fields of education are defined according to the Fields of Education and Training (FoET) classification which is currently under revision by UNESCO-UIS. This breakdown would only be needed for enrolment data.

The following data is required on mobile students enrolled:

- Number of mobile students enrolled, by ISCED levels 5 to 8 (1-digit level of detail), fields of education (3rd level of detail) and sex;

- Number of mobile students enrolled, by ISCED levels 5 to 8 (1-digit level of detail), country of origin and sex.

3.4 Credit mobility: additional data needs

Besides data on degree mobile graduates, the calculation on the EU benchmark on learning mobility statistics needs data on the total number of graduates who had a credit mobility period abroad (see chapter 2 for more details). In addition, policy-makers asked for more information on several characteristics of credit mobility, namely the country of destination, the type of mobility, the type of mobility scheme and the duration of credit mobility.

Therefore, the obligatory data transmission on credit mobility will include:

- number of graduates who have had a credit mobility stay of a minimum duration of three months or representing at least 15 ECTS points throughout the cycle of study, by ISCED levels 5 to 8 (1-digit level of detail) and type of mobility scheme (EU programmes, other international/national programmes, other programmes).

- number of graduates who have had a credit mobility stay of a minimum duration of three months or representing at least 15 ECTS points throughout the cycle of study, by ISCED levels 5 to 8 (1-digit level of detail) and country of destination.

For both datasets the transmission of data for ISCED 5 at 2-digit level of detail and by type of mobility (study period, work placement) is optional.

“Throughout the cycle of study” means measuring credit mobility of graduates within each tertiary ISCED level.

3.4.1 Country and region of destination: credit mobility

In order to further detail exchange programme related flows, the policy makers would like to be able to quantify the extent to which some countries are a preferred destination for credit mobility stays.

3.4.2 Types of mobility

The type of mobility refers to the type of activity that takes place during the credit mobility period. It can either be study or work placement or a combination of both.

- A. *Study period*. This category includes **study period** i.e. when the student goes from a home higher education institution (HEI) to an HEI in another country for studying as part of his/her study programme. This category also includes study periods abroad where a part of the period is a work placement/internship/apprenticeship.
- B. *Work placement/ Internships/ Traineeships*: this category includes work placement/internships/ traineeships organised by a home HEI within a study programme²⁴. This type of mobility does not involve a study period.

²⁴ A work placement abroad can also be organised by the individual student or through a consortium. A consortium is an intermediary in the home country organising work placements for several HEIs as for example chambers of commerce. For example, higher education institutions holding an extended Erasmus University Charter (EUC) can create a national consortium to organise Erasmus placements. Other organisations (enterprises, associations, chambers of commerce, foundations, etc.) can also participate in such a consortium. A consortium consists of at least one coordinating institution/organisation and one partner higher education institution. The coordinating institution/organisation applies for Erasmus student placement mobility grants and organisation of mobility funds to its home country’s Lifelong Learning Programme National Agency. (Source: The Erasmus programme 2008/2009 - A Statistical Overview).

Data are collected for the two categories of activity separately. When students in credit mobility performed the two categories of activity (study period and traineeship/work placement) during the same stay, they are classified in the ‘study period’ category.

3.4.3 Type of mobility scheme

Data on the type of mobility schemes are relevant in assessing the role of the various programmes in the development of learning mobility and thus the effectiveness of national strategies and tools towards learning mobility targets.

The data are collected according to the following breakdowns:

- **Credit mobility under EU programmes; this means programmes financed by the EU e.g. ERASMUS²⁵.**
- **Credit mobility under other international/national programmes (e.g. bilateral or multilateral programmes).** This second group covers specific multilateral or bilateral programmes at national or regional level but also arrangements between individual universities for exchanging students. For instance, credit mobility under the “Nordplus higher education programme”²⁶ should be reported in this category. The programmes in this category are not financed by the EU.
- **Credit mobility under other programmes.** This third option covers the cases where students on their own organise a recognised study period abroad which would be credited by the home institution. This category is therefore also called ‘free movers’²⁷.

For the sake of data comprehensiveness, a residual category of “Unknown type of mobility” will be offered in the data collection to cover cases that cannot be classified. This category will cover cases where there is not enough information available on an individual mobile student in order to classify him/her in one of the three categories above.

3.4.4 Duration of credit mobility and ‘Other short term mobility’

The population of credit mobile students is defined as those who spend an education and training abroad that lasts at least 3 months in a row or alternatively, which study attainment correspond to at least 15 ECTS credits during the academic year.

The 2011 Council conclusions and the EHEA invited the European Commission to enlarge the scope of the available data on learning mobility statistics to short term mobility (i.e. mobility shorter than the 3 months or alternatively less than 15 ECTS credits in a row).

Therefore, there will be optional transmission of data on number of graduates who have had a credit mobility stay of duration shorter than 3 months or less than 15 ECTS credit points, by ISCED levels 5 to 8 (ISCED 5: 2-digit level of detail; ISCED 6 to 8: 1-digit level of detail), country of destination and type of mobility (study period, work placement).

²⁵ According to online programme information, LEONARDO (vocational) and GRUNDTVIG (adult education) participation do not fall under formal programmes within ISCED 5 – 8 so that it should not be included in the data sets. For ERASMUS Mundus there is only scholarship information collected.

²⁶ For more information on Nordplus, please see: http://www.nordplusonline.org/eng/higher_education/about_nordplus_higher_education and <http://www.nordplusonline.org/eng/content/download/2002/26056/file/Nordplus%20HE%20Rules%20in%20brief.pdf>

²⁷ Free movers that are not enrolled in any tertiary programme should be excluded from the data.

4 ANNEX I: ‘PRIOR EDUCATION’ VS. ALTERNATIVE CRITERIA TO IDENTIFY MOBILE STUDENTS/GRADUATES

A degree mobile student is a student enrolled (or graduate) in a country different from his/her country where he/she graduated from upper secondary education. In current mobility statistics some countries define mobile students on the basis of their permanent /usual residence rather than country of prior education. Some other countries are only able to provide data on students by citizenship as a proxy for learning mobility statistics.

Such diversity in the criteria used to monitor mobility is a clear limitation when developing an EU benchmark on learning mobility. This explains why the European Commission needs learning mobility to be identified by a unique criterion. This annex aims at presenting the arguments justifying why the ‘prior education’ criterion is the best unique criterion to define degree mobile students compared to other criteria (residence or citizenship).

4.1 Prior/permanent/usual residence

4.1.1 Prior/permanent/usual residence: definition

According to the residence criterion, mobile students/graduates are students/graduates who had their residence in another country before they took up their first tertiary-level degree programme (**prior residence**). However in practice, National Statistical Institutes sometimes use country of (current) “**permanent residence**” or “**usual residence**”:

According to the **Regulation (EC) No 763/2008 of the European parliament and of the Council of 9 July 2008 on population and housing censuses**²⁸;

“The ‘usual residence’ shall mean the place where a person normally spends the daily period of rest, regardless of temporary absences for purposes of recreation, holidays, visits to friends and relatives, business, medical treatment or religious pilgrimage.

The following persons alone shall be considered to be usual residents of the geographical area in question:

- i. those who have lived in their place of usual residence for a continuous period of at least 12 months before the reference date; or*
- ii. those who arrived in their place of usual residence during the 12 months before the reference date with the intention of staying there for at least one year.*

Where the circumstances described in point (i) or (ii) cannot be established, ‘usual residence’ shall mean the place of legal or registered residence.”

The statistical use of the place of legal or registered residence raises the issue of comparability across countries. Indeed, permanent residence is a legal concept and the rules regarding residence permits are not harmonised across countries. In international statistics, this reduces the comparability of data when using the concept to identify mobile students. On the opposite, the concept of country of prior upper secondary education is based on information on education systems organised according to the ISCED classification and therefore comparable across countries.

²⁸ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2008:218:0014:0020:EN:PDF>

Furthermore, the first two circumstances (i) and (ii) as described above can change over time and raise the issue of the stability of the residence criterion.

4.1.2 Permanent/usual residence: instability over time

The permanent/usual residence situation can change over time and this affects the status of mobile students in the course of the tertiary education cycle (i.e. within an ISCED level).

For instance, a student who gets a permanent residence permit in the country of destination during her/his study period there is thus no longer to be regarded as a mobile student.

If the country of permanent/usual residence changes during the study period, therefore, the country of origin would also change. The following example illustrates this instability:

A student who originally had his/her permanent residence in France at the end of secondary education and moves to the UK to take a first degree there:

- will be a student with the UK as country of origin if he/she stays in the UK to work there for at least one year (see regulation above) and afterwards enrolls for a Master's programme in another country than the UK.
- If he/she started a second programme in the UK less than one year after having finished the first degree, the status of a mobile student and the country of origin should be kept at the start of a second programme within tertiary education in the country of destination.

When applying the two criteria (prior education and permanent residence) to identify the mobile population in the student reference population, the total number of degree mobile students may also differ in the following cases:

- Students, who formerly did not live in the country where they went to school and where they acquired the national entrance qualification for tertiary education. This applies to students who crossed a national boundary on a daily basis to get to school ("international commuters"). This is possible especially in countries with identical language in the region of the boundary.
- Students with prior education abroad who have lived in their country of study already for more than 12 months at the time of their first enrolment. In this case they would only count as mobile students when applying the criteria "prior education".

4.2 Citizenship

Citizenship has been used as a proxy for mobility when the prior education information was not available. However, this must be avoided since the citizenship concept is inadequate to measure student mobility for different reasons:

- The concept of citizenship captures immigration. Not all foreign students have come to their country of study expressly with the intention of studying. In fact, most of them may have followed the migration of their parents. In such case, foreign students may have arrived in the country of study before their tertiary studies and without the specific purpose of learning.
- The concept of citizenship is a legal concept and the legislation regarding the acquisition of citizenship varies across countries. This hampers the comparability of the overall student population with foreign citizenship.

- When used to monitor learning mobility, the concept of citizenship does not identify the category of ‘homecoming nationals’ which should be considered as learning mobility since this population physically moved with the purpose of learning.

Due to changing social contexts in Europe, the traditional link between people’s citizenship and their countries of domicile is gradually becoming looser and foreign citizenship is therefore steadily losing relevance as a statistical criterion for identifying incoming mobile students. This trend has two strands.

First, many tertiary students with foreign citizenship are today no longer mobile students. Some EU Member States which traditionally have experienced labour migration during the last 40-50 years have different traditions for naturalising their foreign workers. Secondly, due to the growing number of families living outside the country in which they are citizens, more students with home citizenship can now also be incoming and thus mobile students.