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DRAFT REPORT

on the implementation of inclusion measures within Erasmus+ 2014-2020
(2021/2009(INI))

Committee on Culture and Education

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EXPLANATORY STATEMENT - SUMMARY OF FACTS AND FINDINGS

1. Introduction

The implementation report on “Inclusion Measures within the Erasmus+ Programme 2014-2020” has the objective of assessing and evaluating the implementation of inclusion measures within the Erasmus+ programme for the period 2014-2020, with a view to identifying good practices and to help address challenges in the current Erasmus+ programme edition 2021-2027.

The Erasmus+ programme 2014-2020 was a successor to the Lifelong Learning programme (2007-2013), encompassing separate programmes under one umbrella programme, namely:

- the Lifelong Learning programme:
 - Erasmus for higher education,
 - Leonardo da Vinci for vocational education and training,
 - Comenius for school education,
 - Grundtvig for adult learning,
 - Jean Monnet for promoting European integration;
- Five international cooperation programmes: Erasmus Mundus, Tempus, Alfa, Edulink, and bilateral cooperation programmes in the field of higher education (with Canada, the United States, Australia, Japan, New Zealand and South Korea);
- The Youth in Action programme.

In 2014, the Erasmus+ Youth Inclusion and Diversity Strategy (IDS) was introduced with the aim of increasing the number and quality of inclusion and diversity projects, supporting projects involving participants with fewer opportunities and encouraging the participation of more young people with fewer opportunities.

The Rapporteur has gathered information and drafted this implementation report following intensive consultations of stakeholders and national agencies (NAs), and based on the following written sources:

- A European Parliamentary Research Service (EPRS) study published in September 2021 titled “Inclusion measures within the Erasmus+ programme 2014-2020”.
- Two surveys:
 - One survey sent out to 42 NAs from the participating countries to the Erasmus+ programme during the 2014-2020 programme. 26 completed surveys were returned. These 26 responses came from 17 participating countries. Most of the NAs that took part in this survey cover school education, vocational education and training, higher education, adult education and youth. A few were dedicated specifically to youth, while a few others covered all of the other fields but youth. One of the responding Irish NAs only covers Higher Education.
 - One survey sent out to various stakeholders from participating countries in the

Erasmus+ programme during the 2014-2020 programme. 10 completed surveys were returned. Some covered a very broad remit, while others were focused on specific categories of learners with fewer opportunities.

In addition to this stakeholder survey, a meeting of Shadow Rapporteurs with stakeholders was organised in February 2022, where stakeholders from local associations, pan-European organisations and NAs were invited to discuss the implementation of inclusion measures in the Erasmus+ programmes.

This implementation report will address the role of NAs in supporting the implementation of inclusion measures, along with the additional support provided by SALTO-YOUTH (Support, Advanced Learning and Training Opportunities for Youth) resource centres, specifically the SALTO inclusion and diversity resource centre, and key stakeholders working with individuals coming from disadvantaged backgrounds or with special needs. Based on the EPRS study, the responses from the surveys and the Shadows' meeting organised with stakeholders, the first section of this report will discuss the following points:

- The definition of learners with fewer opportunities and special needs;
- The outreach strategy implemented by NAs and stakeholders, along with the outreach support provided by the Commission and SALTO;
- Successes, shortcomings and identified obstacles to the implementation of inclusion measures;
- The role of inclusion officers.

2. Definition of learners with fewer opportunities and those with special needs

2.1. A broad definition

Both the study and the surveys used the same definition of participants with fewer opportunities and with special needs, based on the 'Erasmus+ Inclusion and Diversity Strategy' implemented by the European Commission in 2014, with the following categories:

- Disability (i.e. participants with special needs): young people with mental (intellectual, cognitive, learning), physical, sensory or other disabilities etc.
- Health problems: young people with chronic health problems, severe illnesses or psychiatric conditions etc.
- Educational difficulties: young people with learning difficulties, early school-leavers, lower qualified persons, young people with poor school performance etc.
- Cultural differences: immigrants, refugees or descendants from immigrant or refugee families, young people belonging to a national or ethnic minority, young people with linguistic adaptation and cultural inclusion difficulties etc.
- Economic obstacles: young people with a low standard of living, low income, dependence on the social welfare system, young people in long-term unemployment or poverty, young people who are homeless, in debt or with financial problems etc.
- Social obstacles: young people facing discrimination because of gender, age, ethnicity, religion, sexual orientation, disability, etc., young people with limited social skills or

- anti-social or high-risk behaviours, young people in a precarious situation, (ex-)offenders, (ex-)drug or alcohol abusers, young and/or single parents, orphans etc.
- Geographical obstacles: young people from remote or rural areas, young people living on small islands or in peripheral regions, young people from urban problem zones, young people from less serviced areas (limited public transport, poor facilities) etc.”

The only difference was that the surveys made use of these categories to identify all learners, and not only young learners.

The study reveals that most of the NAs used the categories mentioned above, a conclusion supported by the results of the survey sent to NAs in January 2022. The broad definition and interpretation concerning the group of learners with special needs or fewer opportunities is desired by most NAs. The stakeholders were broadly similar in their responses to the survey.

2.2. Additional considerations regarding learners with fewer opportunities

The EP study considers additional characteristics of disadvantaged learners, namely those lacking digital skills (44% of the European population in 2020, aged 16-74), those who left schools early (9.9% of the European population in 2020, aged 18-24) and those with low-skills who prefer short-term goals.¹

In addition, the study requested that further attention be paid to older people, to participants with mental disabilities and to unemployed people who are ill.

2.3. Most and least represented groups of learners with fewer opportunities

The 2022 survey revealed that the responding NAs reached out the most to participants with disabilities, with educational difficulties and economic obstacles, while reaching out the least to participants with geographical obstacles, health problems and social obstacles. Additionally, most NAs indicated that they worked the most with participants with disabilities and economic obstacles, and the least with participants with geographical obstacles. Stakeholders indicated that they also worked most with participants who had economic obstacles, but social obstacles were also a major part of their work. Those with health obstacles featured the least in responses.

2.4. Issue of identification

Several NAs raised the issue of identification. They noted a number of unrecorded cases of participants with fewer opportunities who might not have been identified as such by the beneficiaries in their reports. Likewise, some participants may not identify themselves as having fewer opportunities, or those with fewer opportunities may not believe that Erasmus+ is for them, hinting that some groups pre exclude themselves from the programme *ex ante*.

3. Reaching out to learners with fewer opportunities and special needs

3.1. Outreach

NAs mostly cooperate with organisations, local associations and structures active in fields

¹ See https://ec.europa.eu/eurostat/databrowser/view/sdg_04_70/default/table?lang=en and https://ec.europa.eu/eurostat/databrowser/view/sdg_04_10/default/table?lang=en.

relevant to the inclusion of people with fewer opportunities in order to target potential participants with fewer opportunities. Engaging with these organisations and local associations positively impacts the ability of NAs to ensure the Erasmus+ programme is known to everyone. Further outreach methods include social media content, websites, face-to-face meetings, events, testimonials, role models, the Eurodesk platform and the E-twinning ambassadors. It can be said, however, that materials and publications in relevant languages or formats with information about support for people with fewer opportunities are not very widely used. Organising targeted events for specific groups (with tailored support to attend such events), focus groups and meetings with project coordinators are also used as outreach strategies.

NAs created a variety of information materials to promote the Erasmus+ programmes to learners with fewer opportunities and special needs. These materials include leaflets, videos, Social Media content, testimonial stories from projects with young people with fewer opportunities, diverse publications for different target groups on different programme aspects and funding possibilities, newsletters, booklet, articles, webinars, learning materials, workshop materials, etc.

Stakeholders engage heavily with second and third level establishments. For instance, working with community centres was a popular response, and individual stakeholders cited collaboration with civil society organisations and youth groups. They also cited word of mouth as useful in identifying individuals. However, they cited working with unemployment centres less often than other options.

Stakeholders heavily emphasised the importance of face-to-face meetings, coaching and workshops. They also relied heavily on targeted events and testimonials. Visits and advice centres were a popular choice by a number of stakeholders. Similarly to NAs, the use of resources such as literature was not as popular as other options. Some stakeholders also mentioned offering tailor-made pilot testing for courses.

3.2. Communication support by Commission and SALTO

The SALTO YOUTH inclusion and diversity resource centre indicates that they provide several types of support to NAs, such as inclusion trainings, training and youth-work tools, inclusion information and project opportunities, practical publications and bringing stakeholders together to facilitate inclusion projects.

The Commission and SALTO resource centre also supported NAs in their outreach activities in a variety of forms, including leaflets, videos, a 'cookbook' with 'inclusion recipes', created by the SALTO resource centres, podcasts, guidelines, Erasmus+ guides or targeted publications. One national agency welcomed translated resources, which they found useful to them. However, another noted that they were not aware of many materials available.

Additional support from the Commission and SALTO for outreach activities included manuals and guides, forums between NAs and seminars. It seems that while training for outreach activity was offered, most NAs did not take part in it. However, three NAs mentioned TCA training for inclusion strategies.

One advertised tool by the SALTO resource centre is the SALTO toolbox, offered to NAs as a way to share useful training tools and to help them design training and youth work tools in support of inclusion projects. However, the NAs brought little contribution to this toolbox.

It should be pointed out that the SALTO inclusion and diversity resource centre, and therefore the communication they created to support NAs, was only designed for the youth action part of the programme. Several surveyed NAs indicated that they were looking forward to a SALTO inclusion and diversity resource centre encompassing all fields and all ages.

3.3. NAs collaboration with stakeholders

Eighty percent of the respondents of the survey sent to the national agency replied that they had worked with local associations and other civil society bodies during the 2014-2020 period. Among 21 respondents, 10 had set up a strategy with local associations to reach out to people with fewer opportunities. Eighty percent of the respondents also had reached out themselves to local associations, while sixty-five percent said that local associations had reached out to them.

NGOs from target groups, secondary school contacts and other NAs dealing with the same target groups were the main stakeholders with which the NAs work, according to the results of the 2022 survey. The youth section of political parties, along with sports organisations and employment offices were the least selected options. The NAs added further stakeholders that were not suggested, such as:

- Tertiary education institutions through their Erasmus+ offices;
- Special schools;
- Expert organisations, e.g. on volunteering for persons with disabilities or in the context of refugee work (in the framework of two NA cooperation projects);
- Umbrella organisations for social youth work;
- Local, regional and national authorities responsible for school education;
- International relations officers and study counsellors at HEIs;
- A support centre for students with special needs.

3.4. Stakeholders' collaboration with NAs

Corroborating the perspectives of the NAs, 80% of the stakeholders responding to the survey said that they had been in contact with the NAs. However, a majority gave negative responses when asked whether they had received support from the national agency to promote Erasmus+: 5 out of 10 said no, while 4 out of 10 said yes, with one giving no answer.

In terms of those who did receive support, they generally received more knowledge sharing and expertise. Two stakeholders received funding/training. None chose the extra staff option. This was one of the criticisms mentioned by stakeholders in other sections and therefore could be seen as an avenue for improvement.

While there is clear evidence of outreach efforts, the EPRS study included in their recommendations the development of an instrument to monitor if learners with special needs and fewer opportunities are effectively reached.

4. Results: Successes, shortcomings and identified obstacles;

4.1 Number of participants with fewer opportunities or with special needs.

As mentioned previously, the number of participants with fewer opportunities or with special needs are not known, as they have not been recorded as such. As a result, when asked about specific data, the NAs who responded to the survey sent in February 2022 noted that their responses were an approximation. Nevertheless, it is clear that the percentage of participants does vary from one country to the other, ranging from 1% to about 40%.

Stakeholders gave a wide variety of answers ranging from 1200+ participants directed towards the programme and 1300+ participating directly in the programme from their organisation down to 50 directed and 35 participating. This wide disparity reflects the size and capacity of stakeholders, but also demonstrates that the programme could cater for these varying numbers.

In terms of successes, when asked the extent to which participating in Erasmus+ had helped a learner with fewer opportunities enhance their learning opportunities, all of the stakeholders gave positive responses ranging from moderately to very much. This along with the number of participants from the stakeholder organisations again emphasises the positive effect of the programme

4.2. Implemented actions: successes and shortcomings

During 2014-2020, NAs developed strategies to improve the inclusion of individuals with fewer opportunities. NAs were positive in their perception of the success of implemented actions. This perception, but also examples of actions, does prove that NAs have implemented successful inclusion actions during the 2014-2020 period. Nevertheless, NAs mention that insufficient human and financial resources may hinder the success of implementing actions. They also highlighted the need for better cooperation between the Commission and NAs to improve inclusion in all Erasmus+ actions, and for establishing ongoing exchanges between the Commission, NAs and stakeholders from relevant fields/experts on the inclusiveness of the programme.

It is also worth noting that NAs do not only develop outreach strategies for the inclusion of individuals with fewer opportunities in the Erasmus+ programme, but they also work towards enhancing the number of inclusive projects funded by Erasmus+. Indeed, under the Erasmus+ programme 2014-2020, 11,045 funded projects had an inclusion component.²

The EPRS study analysed factors that could contribute to successfully improving learning possibilities for people with fewer opportunities. These factors included the surrounding environment, the identification of prior learning competences, the presence of a coach offering personal guidance throughout the project, self-identified learning targets and the ability to transfer acquired competences to their own contexts upon their return.

4.3. Obstacles for the participation of learners with fewer opportunities and those with special needs:

The EPRS study identified a number of barriers, which have prevented the participation of some learners with fewer opportunities and those with special needs. They include language, financial, psychological and administrative obstacles, but unfamiliarity with the programme

² See https://ec.europa.eu/programmes/erasmus-plus/projects_en.

was also an issue.

Administrative barriers are a recurring theme mentioned by NAs and stakeholders alike, more specifically this refers to difficulties with IT-tools and during the application process. These add an additional layer of burdens in the case of people with fewer opportunities who would like to participate. This obstacle can be overcome by simplifying the processes and the platforms, or by establishing easy access to a support system for participants and association.

Stakeholders felt that the major shortcoming when it came to attracting more learners with fewer opportunities was a lack of staff. Over 80% of respondents of the 2022 survey cited this. They also felt that lack of funding and the administrative burden were critical factors. These are all factors are all interlinked and need to be considered closely.

5. Work of inclusion officers

5.1. Role, missions and workload, hindrances

Most NAs have appointed an inclusion officer, or a team involved in inclusion matters, in order to supervise the national agency's inclusion and diversity efforts.

The 2022 survey sent to NAs was therefore primarily addressed to inclusion officers, or inclusion staff members. Out of 26 respondents, 22 indicated that they were inclusion officers. Other respondents included one TCA coordinator, one Youth Mobility Expert, one team leader and one AD interim horizontal European priorities officer.

The inclusion officer manages a variety of tasks, including the promotion of inclusion measures within the Erasmus+ programme and identifying target groups. When asked about which missions the inclusion officers oversee, the NAs chose the following options most frequently:

- Maintaining awareness of inclusion as a priority in the national agency;
- Training session for organisations;
- Collecting data for the European Commission;
- Networking with inclusion officers from other NAs.

The number of inclusion officers per NAs varied across participating countries, but ranged from none to 5 during the Erasmus+ programme 2014-2020. According to NAs, there were not enough inclusion officers for the workload. Additionally, inclusion officers often covered other roles, including, but not just: project officers, programme administrator, monitoring staff. NAs also remarked that more often than not, inclusion tasks were distributed among the management team.

The lack of time to implement inclusion actions either due to the lack of staff or the number of procedures required was often cited as one of the main issues. Often, staff working on inclusion and diversity matters were also managing other tasks which were deemed more pressing, leaving little time left to work on developing inclusion actions. NAs recommended that at least one person should be fully dedicated to implement inclusion measures.

5.2. Support from Commission and SALTO

The SALTO youth inclusion and diversity resource centre offered the opportunity for inclusion officers to join training sessions, seminars or colleague support groups. The latter seemed to have been one of the most sought-after types of support by inclusion officers. These were generally organised as working days of peer support dedicated to a particular inclusion issue, with the aim of reflecting together on common challenges and of coming up with common solutions. As for the training sessions, they could be specific to one area, such as training for outreach activities, for implementing inclusion actions, for supporting project leaders or for developing national strategies.

Training was offered in a variety of forms, including workshops, forums, conferences and seminars.

However, training only covered the youth field, thus limiting the number of NAs and inclusion staff that could participate.

6. Conclusion

Overall, it can be argued that while inclusion matters gained importance overall in the Erasmus+ programme 2014-2020, and were tackled in a more comprehensive and targeted way than in the predecessor programmes, considerable challenges and shortcomings continued to persist. This corroborates the need for lessons to be learned *for* and more attention being paid *to* inclusion measures and actions in the new Erasmus+ programme generation 2021-2027, in the legal basis of which furthering 'inclusion' is clearly identified as one of the programme's key objectives.

MOTION FOR A EUROPEAN PARLIAMENT RESOLUTION

on the implementation of inclusion measures within Erasmus+ 2014-2020 (2021/2009(INI))

The European Parliament,

- having regard to Articles 6, 10, 165 and 166 of the Treaty on the Functioning of the European Union (TFEU),
 - having regard to Regulation (EU) No 1288/2013 of the European Parliament and of the Council of 11 December 2013 establishing ‘Erasmus+’: the Union programme for education, training, youth and sport and repealing Decisions No 1719/2006/EC, No 1720/2006/EC and No 1298/2008/EC¹,
 - having regard to Regulation (EU) 2021/817 of the European Parliament and of the Council of 20 May 2021 establishing Erasmus+: the Union Programme for education and training, youth and sport and repealing Regulation (EU) No 1288/2013²,
 - having regard to the Commission report of 31 January 2018 entitled ‘Mid-term evaluation of the Erasmus+ programme (2014-2020)’ (COM(2018)0050),
 - having regard to the Commission communication of 14 November 2017 entitled ‘Strengthening European Identity through Education and Culture – The European Commission’s contribution to the Leaders’ meeting in Gothenburg, 17 November 2017’ (COM(2017)0673),
 - having regard to Rule 54 of its Rules of Procedure, as well as Article 1(1)(e) of, and Annex 3 to, the decision of the Conference of Presidents of 12 December 2002 on the procedure for granting authorisation to draw up own-initiative reports,
 - having regard to the opinion of the Committee on Petitions,
 - having regard to the report of the Committee on Culture and Education (A9-0000/2022),
- A. whereas providing equal opportunities for all is, and must continue to be, inherent to the fundamental values of the European Union, and whereas people from all backgrounds and walks of life should be able to benefit from Erasmus+;
- B. whereas the Erasmus+ 2014-2020 Regulation puts emphasis on promoting social inclusion and on the participation of people with special needs or with fewer opportunities, as defined in the ‘Erasmus+ Inclusion and Diversity Strategy’, encompassing persons with disabilities, health problems, educational difficulties, cultural differences, and facing economical, geographical and social obstacles;
- C. whereas no harmonised and mandatory inclusion strategy was established at European

¹ OJ L 347, 20.2.2013, p. 50.

² OJ L 189, 28.5.2021, p. 1.

level for the Erasmus+ programme;

- D. whereas physical mobility enables immersion in, and optimum interaction with, other cultures, and whereas virtual exchanges and learning are a valuable complement to physical mobility, but do not provide the same experience;
 - E. whereas the experience of mobility offered by Erasmus+ can be a transformative experience for participants, and can positively influence their self-confidence, openness, critical thinking, employability and well-being;
 - F. whereas the mid-term evaluation of the Erasmus+ programme 2014-2020 published by the Commission in 2018 underlined the necessity of reaching more people with fewer opportunities and smaller organisations;
1. Notes with satisfaction the overall positive evolution of inclusion measures during the Erasmus+ 2014-2020 programming period;
 2. Highlights that Erasmus+ should support stakeholders' and programme participants' internationalisation plans that remove the physical, psychological, social, socio-economic, linguistic and other types of barriers to learning mobility and that offer clear and detailed information and qualitative support for participants from under-represented groups and those with specific needs;
 3. Stresses the crucial need for adapted funding and grants, such as pre-financing and lump sums, as financial barriers continue to be one of the biggest obstacles faced by people with fewer opportunities in Erasmus+;
 4. Urges the Commission to tackle without delay the serious persistent issues related to Erasmus+ IT tools, which hamper not only the participation of smaller organisations and people with fewer opportunities, but also the participation of all kinds of beneficiaries;
 5. Acknowledges the role of teachers, youth workers and staff as the driving forces behind participating institutions in raising awareness of the programme, in informing and supporting future learners, and identifying people with fewer opportunities, and notes that without them, most participants with fewer opportunities would not be able to take part; calls on the Commission, the Member States and national agencies to value and acknowledge their often voluntary work, to support them by facilitating their own mobility and to provide them with adequate funding, while accompanying participants with fewer opportunities and offering them specific training adapted to their needs;
 6. Stresses the need for the Commission, the Member States and national agencies to provide better support for grassroots organisations in all areas, particularly in the outermost regions and rural areas, and to ensure that resources and projects are distributed fairly in each Member State;
 7. Stresses the importance of providing better financial and material support to staff, so that they can engage with participants and their families, in order to give them more confidence, while ensuring that mobility projects run smoothly;
 8. Notes the positive effect of short-term mobility of schoolchildren in overcoming mental

and psycho-social barriers, and asks the Commission and national agencies to foster mobility projects aimed at children and teenagers;

9. Asks all national agencies to organise targeted information campaigns, both online and offline, and to appoint dedicated inclusion and diversity officers in order to reach out to learners with special needs and/or fewer opportunities;
10. Supports all EU initiatives aimed at facilitating student mobility, such as the Erasmus+ mobile application, ‘paperless Erasmus’ and the European Student Card; calls on the Commission to look closely at the possibility of more closely linking Erasmus+ and Interrail, in order to foster greater equality and provide participants with better access to greener means of transport;
11. Recognises the important role of Support, Advanced Learning and Training Opportunities (SALTO) Inclusion & Diversity for the implementation of inclusion measures for the Erasmus+ Youth strand, and notes that the extension of inclusion strategies to the Education & Training strand in the current programming period will have to be followed closely, as the target groups are different; stresses the need for national agencies to work more closely with employment agencies to facilitate the integration of adult learners into the Erasmus+ 2021-2027 programme;
12. Regrets the lack of reliable data on the participation of people with fewer opportunities in the Erasmus+ programme; underlines the need to gather and monitor a critical mass of reliable data in order to create a management and steering tool for inclusion measures, using methods which respect privacy and do not add undue administrative burdens for organisations and participants;
13. Asks for the specific needs of persons with disabilities to be taken into account in order to facilitate their participation in the programme by offering them hybrid mobility by way of preparation for the mobility period, giving them the opportunity to be accompanied, and providing them with suitable and accessible accommodation and specialised support services based on their needs; stresses the need to collect their feedback after the period of mobility in order to improve the participation of future beneficiaries;
14. Requests the Commission and the Member States to ensure that all relevant information regarding Erasmus+ is accessible to persons with disabilities, in particular through adapted and barrier-free online tools; welcomes the establishment of ‘Erasmus Days’ and stresses the importance of the role of former Erasmus+ participants and alumni networks in promoting the programme widely;
15. Asks the Member States to adopt targeted policies for learners with fewer opportunities and special needs in order to increase participation in Erasmus+ and to foster exchanges of good practices in this field;
16. Stresses the importance of fostering mobility for vocational education and training (VET) students in order to reach young people from all backgrounds, and notes with satisfaction the increased opportunities for their long-term mobility created during the 2014-2020 programming period;
17. Calls on the Commission and the Member States to use the European Year of Youth and

related events to promote the opportunities offered by the Erasmus+ programme;

18. Welcomes the Commission's recent adoption of the 2021-2027 framework of measures aimed at increasing diversity and inclusion in the current Erasmus+ and European Solidarity Corps programmes, but nevertheless calls on the Commission to closely monitor the future national implementation of this framework;
19. Instructs its President to forward this resolution to the Council and the Commission.