

EU Lifelong Learning Programme 2007- 2013 (2012/C 232/04)
Subprogramme Leonardo da Vinci. Call for proposal 2013 EAC/S07/12
Action "Transfer of Innovation"
Project number: 2013-1-ES1-LEO05-66707

“INTERPRETING OUR EUROPEAN HERITAGE”

ECVET for transparency and recognition of learning
outcomes and qualification in European Tourism Sector

WP 5 - Definition and signature of the Memorandum of Understanding - MoU ECVET for the new European common qualifications in tourism sector

Memorandum of Understanding ECVET for the new European
common professional qualifications in tourism sector “Interpretive
Host” and “Interpretive Guide”.

Formal agreement between project partners, public institutions competent in VET and
tourism, sectoral social partners and VET providers at national/regional/local level,
establishing the European correspondence for assessment, transfer, and accumulation of
learning outcomes achieved in formal, informal and non formal contexts (units, unit
parts, related ECVET credit points)

Synthetic version for the dissemination (Info-pack 4)

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1. Introduction

Background to general context of MoU

One of the main obstacles to attracting more interest in trans-national mobility as part of initial and continuing vocational training and education is the difficulty in identifying, validating and recognising learning outcomes acquired during a stay in another country. Furthermore lifelong learning is taking place increasingly in different countries and in a wide variety of contexts, formal, non-formal and informal.

What is needed, therefore, is a way of enabling people to pursue their learning pathway by building on their learning outcomes when moving from one learning context to another, and from one country to the other.

Considering the diversity described above, common conventions and technical principles are required in order to ensure mutual trust and to enable the transfer and recognition of learning outcomes in the context of trans-national mobility.

The Lisbon European Council in 2000 concluded that increased transparency of qualifications and lifelong learning should be two of the main components in the efforts to adapt Europe's education and training systems both to the demands of the knowledge society and to the need for an improved level and quality of employment.

The 2002 Council Resolution on the promotion of enhanced European cooperation in VET (the "Copenhagen Process") emphasised that giving priority to a system of credit transfer for VET was one of the common measures needed in order to promote the transparency, comparability, transferability and recognition of competence and/or qualifications, between different countries and at different levels.

In the 2004 Maastricht Communiqué, the Ministers responsible for VET, the Commission and the European social partners agreed to give priority to the development and implementation of

ECVET. This was confirmed by the same group in the 2006 Helsinki Communiqué which calls further development of common European tools namely ECVET.

On these basis, in 2009 was published the specific Recommendation of the European Parliament and of the Council of 18 June 2009 on the establishment of a European Credit System for Vocational Education and Training (ECVET).

Existing provisions for the MoU at European level

The ECVET common European tools belong to a series of European initiatives, including the European Credit Transfer and Accumulation System (ECTS), Europass, the European Quality Charter for Mobility (EQCM), the European principles for the identification and validation of non-formal and informal learning and the European Qualification Framework for lifelong learning (EQF):

- ECTS was promoted by the Recommendation of the European Parliament and Council of 10 July 2001 on mobility within the Community for students, persons undergoing training, volunteers, teachers and trainers, used in higher education. ECVET should be compatible with ECTS so as to enable bridging vocational education and training and higher education.
- Europass was created by Decision No 2241/2004/EC of the European Parliament and of the Council of 15 December 2004 on a single Community framework for the transparency of qualifications and competences.
- The European principles for the identification and validation of non-formal and informal learning were agreed in the form of Council Conclusions in 2004. The implementation of ECVET will take these principles into account.
- EQCM was adopted through the Recommendation of the European Parliament and of the Council of 18 December 2006 on trans-national mobility within the Community for education and training purposes (European Quality Charter for Mobility). It states in point 8 of its Annex that, when mobility is undertaken by individuals, "participants should be provided with assistance to facilitate recognition and certification" of learning outcomes. ECVET is intended to support the quality of individuals' mobility as required by the above mentioned Recommendation.

- EQF was launched by the 2008 Recommendation of the European Parliament and of the Council on the European qualification framework (EQF) as a reference tool for the comparison of qualification levels in national qualifications systems and also in qualifications systems developed by international sectoral organisations. ECVET will complement and build on common concepts and principles with the EQF. Indeed, ECVET uses EQF as the reference level for qualifications.
- Finally, the establishment of a European Credit System for Vocational Education and Training (ECVET) was object of the Recommendation of the European Parliament and of the Council of 18 June 2009.

ECVET does not apply to the mutual recognition of qualifications in the area of regulated professions, as that is ensured by Directive 2005/36/EC of 7 September 2005, because ECVET is not a tool for granting rights to migrants in recognition of their qualifications acquired in one Member State with a view to exercising a regulated profession in another Member State. In such a case, only the Directive imposes legally binding obligations on Member States' authorities.

Definitions

For the purposes of the Memorandum of Understanding - MoU, the definitions which apply are the following:

- a) "Qualification": a formal outcome of an assessment and validation process which is obtained when a competent institution determines that an individual has achieved learning outcomes to given standards;
- b) "Learning outcomes": statements of what a learner knows, understands and is able to do on completion of a learning process and which are defined in terms of knowledge, skills and competence;
- c) "Unit of learning outcomes" (unit): a component of a qualification, consisting of a coherent set of knowledge, skills and competence, that can be assessed and validated;

- d) "Credit for learning outcomes" (Credit): individuals' set of learning outcomes which have been assessed and which can be accumulated towards a qualification or transferred to other learning programmes or qualifications;
- e) "Competent institution": the institution which is responsible for designing and awarding qualification or recognising units or other functions linked to ECVET, such as allocation of ECVET points to qualifications and units, assessment, validation and recognition of learning outcomes, under the rules and practices of participating countries;
- f) "Assessment of learning outcomes": methods and processes used to establish the extent to which a learner has in fact attained particular knowledge, skills and competence;
- g) "Validation of learning outcomes": the process of confirming that certain assessed learning outcomes achieved by a learner correspond to specific outcomes which may be required for a unit or a qualification;
- h) "Recognition of learning outcomes": the process of attesting officially achieved learning outcomes through the awarding of units or qualifications;
- i) "ECVET points": a numerical representation of the overall weight of learning outcomes in a qualification and of the relative weight of units in relation to the qualification.

Principles and technical specifications

According to the 2009 EU Recommendation, ECVET is a technical framework for the transfer, recognition and, where appropriate, accumulation of individuals' learning outcomes with a view to achieving a qualification. ECVET tools and methodology comprise the description of qualifications in terms of units of learning outcomes with associated points, a transfer and accumulation process and complementary documents such as learning agreements, transcripts of records and ECVET users' guides.

ECVET is intended to facilitate the recognition of learning outcomes in accordance with national legislation, in the framework of mobility, for the purpose of achieving a qualification. Its application is based on the following principles and technical specifications:

1. Units of learning outcomes: A unit is a component of a qualification, consisting of a coherent set of knowledge, skills and competence that can be assessed and validated with a number of

associated ECVET points. A qualification comprises in principle several units and is made up of the whole set of units. Thus, a learner can achieve a qualification by accumulating the required units, achieved in different countries and different contexts (formal and, where appropriate, non-formal and informal), while respecting national legislation relating to the accumulation of units and the recognition of learning outcomes.

The units that make up a qualification should be:

- described in legible and understandable terms by referring to the knowledge, skills and competences contained in them,
- constructed and organised in a coherent way with regard to the overall qualification,
- constructed in a way that enables discrete assessment and validation of learning outcomes contained in the unit.

A unit may be specific to a single qualification or common to several qualifications. The expected learning outcomes defining a unit may be achieved irrespective of where or how these have been achieved. Thus, a unit is not to be confused with a component of a formal learning programme or training provision. The rules and procedures for defining characteristics of units of learning outcomes and for combining and accumulating units for a given qualification are defined by competent institutions and partners involved in the training process according to the national or regional rules.

The specifications for a unit should include:

- the generic title of the unit,
- the generic title of the qualification (or qualifications) to which the unit relates, where applicable,
- the reference of the qualification according to the EQF level and, where appropriate, the national qualifications framework (NQF) level, with the ECVET credit points associated with the qualification,
- the learning outcomes contained in the unit,
- the procedures and criteria for assessment of these learning outcomes,
- the ECVET points associated with the unit,
- the validity in time of the unit, where relevant.

2. Transfer and Accumulation of learning outcomes, ECVET partnerships: In ECVET, units of learning outcomes achieved in one setting are assessed and then, after successful assessment,

transferred to another setting. In this second context, they are validated and recognised by the competent institution as part of the requirements for the qualification that the person is aiming to achieve. Units of learning outcomes can then be accumulated towards this qualification, in accordance with national or regional rules. Procedures and guidelines for the assessment, validation, accumulation and recognition of units of learning outcomes are designed by the relevant competent institutions and partners involved in the training process. Credit transfer based on ECVET and applied to learning outcomes achieved in formal learning contexts should be facilitated by establishing partnerships and networks involving competent institutions, each of which is empowered, in their own setting, to award qualifications or units or to give credit for achieved learning outcomes for transfer and validation.

The establishment of partnerships aims to:

- provide a general framework of cooperation and networking between the partners, set out in Memorandum of Understanding (MoU) through which a climate of mutual trust is established,
- assist the partners in the design of specific arrangements for credit transfer for learners.

The MoU should confirm that the partners:

- accept each other's status as competent institutions,
- accept each other's quality assurance, assessment, validation and recognition criteria and procedures as satisfactory for the purposes of credit transfer,
- agree the conditions for the operation of the partnership, such as objectives, duration and arrangements for review of the MoU,
- agree on the comparability of qualifications concerned for the purposes of credit transfer, using the reference levels established by EQF,
- identify other actors and competent institutions that may be involved in the process concerned and their functions.

For applying ECVET to learning outcomes achieved in a non-formal and informal learning context or outside the framework of an MoU, the competent institution which is empowered to award qualifications or units or to give credit should establish procedures and mechanisms for the identification, validation and recognition of these learning outcomes through the award of the corresponding units and the associated ECVET points.

3. Learning agreement and personal transcript: For applying credit transfer involving two partners and a specific mobile learner, a learning agreement is concluded by the two competent institutions involved in the training and validation process and the learner, in the framework of a MoU. It should:

- distinguish between competent ‘home’ and ‘hosting’ institutions (the ‘home’ institution is the institution which will validate and recognise learning outcomes achieved by the learner; the ‘hosting’ institution is the one that delivers training for the learning outcomes concerned and assesses the achieved learning outcomes),
- specify the particular conditions for a period of mobility, such as the identity of the learner, the duration of the mobility period, learning outcomes expected to be achieved and the associated ECVET points.

The learning agreement should lay down that, if the learner has achieved the expected learning outcomes and these have been positively assessed by the ‘hosting’ institution, the ‘home’ institution should validate and recognise them as part of the requirements for a qualification, according to the rules and procedures established by the competent institution and the country. Transfer between partners can apply to learning outcomes achieved in formal and, where appropriate, non-formal and informal contexts.

Thus, the transfer of credit for achieved learning outcomes has three stages:

- the ‘hosting’ institution assesses the learning outcomes achieved and awards credit to the learner; the learning outcomes achieved and the corresponding ECVET points are recorded in a learner's ‘personal transcript’ (document which details the learners’ assessed learning outcomes, units and ECVET points awarded),
- the ‘home’ institution validates the credit as a suitable record of the learner's achievement,
- the ‘home’ institution then recognises the learning outcomes that have been acquired; this recognition gives rise to the award of the units and their corresponding ECVET points, according to the rules of the ‘home’ system.

Validation and recognition by the competent ‘home’ institution depend on the successful assessment of learning outcomes by the competent ‘hosting’ institution, in accordance with the agreed procedures and quality assurance criteria.

4. ECVET points: ECVET points provide complementary information about qualifications and units in numerical form. They have no value independent of the acquired learning outcomes for the particular qualification to which they refer and they reflect the achievement and accumulation of units. To enable a common approach for the use of ECVET points, a convention is used according to which 60 points are allocated to the learning outcomes expected to be achieved in a year of formal full time VET. In ECVET the allocation of points usually has two phases: ECVET points are allocated first to a qualification as a whole and then to its units. For a given qualification, one formal learning context is taken as a reference and, on the basis of the convention the total number of points is assigned for that qualification. From this total, ECVET points are then allocated to each unit according to their relative weight within the qualification. For qualifications which do not have a formal learning pathway reference, ECVET credit points can be allocated through estimation by comparison with another qualification which has a formal reference context. To establish the comparability of the qualifications, the competent institution should refer to the equivalent EQF level or, possibly, NQF level, or to the similarity of the learning outcomes in a closely related professional field. The relative weight of a unit of learning outcomes, with regard to the qualification, should be established according to the following criteria or to a combination thereof:

- the relative importance of the learning outcomes which constitute the unit for labour market participation, for progression to other qualification levels or for social integration,
- the complexity, scope and volume of learning outcomes in the unit,
- the effort necessary for a learner to acquire the knowledge, skills and competence required for the unit.

The relative weight of any given unit common to several qualifications, as expressed in ECVET points, may vary from one of these qualifications to another. Allocations of ECVET points are normally part of the design of qualifications and units. They are produced by the competent institution responsible for the design and maintenance of the qualification or specifically empowered for this task. In countries where there is already a national system of points, the relevant competent institutions establish arrangements for the conversion of national credit points to ECVET points.

The successful achievement of a qualification or of a unit triggers the award of the associated ECVET points, independently of the actual time required to achieve them. Usually the transfer of a unit entails the transfer of the corresponding ECVET points so that they are included when the transferred learning outcomes are recognised, in accordance with national or regional rules. It is up to the competent institution to reconsider, where necessary, the ECVET points to be taken into account, as long as the rules and methodologies which are laid down for this purpose are transparent and underpinned by quality assurance principles. Any qualification acquired through non-formal or informal learning for which a formal learning pathway reference can be identified, and the corresponding units, carry the same ECVET points as the reference, since the same learning outcomes are being achieved.

The “Interpreting our European Heritage” multilateral project of transfer of innovation, which is underway within the sectoral programme Leonardo da Vinci of the EU Lifelong Learning Programme 2007-13, was designed to achieve the general objectives mentioned above with particular reference to the tourism sector, focussing on putting in transparency and recognition of competences of sectoral professional figures related of heritage interpretation.

The project is financed within the priority 5 “ECVET for transparency and recognition of learning outcomes and qualifications” (LEO-TraInno-11) of the Leonardo da Vinci MP ToI projects 2013 call, and as such it is aimed to apply the European tools and frameworks EQF and ECVET to to put in transparency and recognise across Europe the learning outcomes and the qualifications of the concerned professional figures in the tourism sector, particularly through the establishment of a MoU ECVET defining the qualification field in terms of learning outcomes, mapping it onto the EQF via national qualifications frameworks and systems, designing qualification in transferable units of learning outcomes with allocation of credit points, and by means of its enforcement (Learning Agreements, Credits Awarding, Transfer Validation and Accumulation) through related VET programmes with flexible devices for validation, transfer and recognition of learning outcomes achieved in formal, informal and non formal contexts, also mainstreaming and multiplying these results.

The project Consortium and associated partnership includes important representative and VET organisations (in Italy, *Aris Formazione e Ricerca Società Cooperativa*; in Austria, *BEST Institut für*

berufsbezogene Weiterbildung und Personaltraining GmbH; in Hungary, *Tradenet Global*), also SMEs or entities of the tourism sector or local development at national, regional and local level (in Spain, *Koan Consulting S*; in Italy, *Consorzio Itaca*; in Slovenia, *NEC Notranjski ekološki center, Cerknica*), public institutions competent in tourism or environment at regional and national level (in particular, *Ayuntamiento de Segovia* and CENEAM in Spain and the Italian *Regione Umbria*) and also organisations specialised in European networking within entrepreneurship and sustainable tourism (the Belgian *Diesis Coop srl-fs*).

The project is aimed to the organisation and realisation of the 4 fundamental steps of the ECVET process:

- Phase 1 - Establishment of the European Partnership: to establish the correspondence between qualifications (units and credit units) and the learning outcomes interested by the transfer, as well as the evaluation, transfer and validation (units/unit parts), the project partners, the social partners of the tourism sector and the public institutions competent in VET and in tourism matter at the different levels of the participating Countries will undersign this Memorandum of Understanding – MoU ECVET;
- Phase 2 - Learning Agreements ECVET: definition and signature (by professionals and trainees interested to recognition of concerned professional qualifications, by related enterprises and by concerned VET providers) of the individual Learning Agreements ECVET describing, in compliance with the MoU, the training process in formal, informal and non formal contexts, and the related ECVET credits to be obtained to gain the qualification;
- Phase 3 - ECVET Credits Awarding: awarding to the involved professionals and trainees, by the concerned VET providers at the end of the official training process, of the ECVET credits related to verified learning outcomes, utilising Europass Certificate Supplement;
- Phase 4 – To start the process of transfer, validation and accumulation of the awarded ECVET credits in the sectoral and territorial VET systems involved in the MoU, in compliance with national and regional rules on certification ways and procedures, formal, non-formal and informal learning validation, qualification bodies.

As yet, the project implementation process has been centred on the preparation of the useful documentation at the aim of the Memorandum of Understanding – MoU signing, particularly the

design of qualifications of **Interpretive Guide and Interpretive Host**, defined in a shared way starting from a perimeter of professional figures operating heritage interpretation in tourism, and following the strategies, activities and tools to be used by the partners to activate and develop the ECVET process, defined on the basis of best practices collected, analysed and selected for ECVET process in tourism and in other sector.

In particular, the project activities has until now allowed the definition of a trans-national document, shared by all the participating European partners, which describes in terms of activities, tasks, skills and knowledge, units of learning outcomes and correspondence between units and associated credit points, the professional qualifications of **Interpretive Guide and Interpretive Host** (see Appendix 1 of this MoU).

2. Form and content of the MoU

Participants

The MoU is an agreement open to all the interested organisations and in particular to public authorities competent in VET and tourism, to social partners and VET providers operating in tourism sector and to other interested Parties, to implement the MoU at European, national, regional, local and sectoral level, starting from the partners of the Leonardo da Vinci MP ToI project “Interpreting our European Heritage” and by the organisation adhering and collaborating to this.

Purpose of the MoU

For applying ECVET in the participating Countries to learning outcomes achieved in formal, non-formal and informal learning context in the tourism sector, particularly for the professional figures operating as **Interpretive Guide and Interpretive Host**, this MoU establishes that each participant:

- accepts each other’s status as interested actors and/or competent institutions;

- accepts each other's quality assurance, assessment, validation and recognition criteria and procedures as satisfactory for the purposes of credit transfer;
- agrees the conditions for the operation of the partnership, such as objectives, duration and arrangements for review of the MoU;
- agrees on the comparability of qualification concerned for the purposes of credit transfer, using EQF to establish the reference levels;
- identifies other actors and competent institutions that may be involved in the process concerned and their functions;
- agrees that, during the implementation of MoU, it will be ensured a “preferential lane” for women and aged people, within all users of the process.

Ratification and effectiveness of the MoU

This MoU has been duly executed and signed by an official representative of each of signatories. MoU shall come into effect for each party from the date of its signature.

This MoU and its Appendixes shall be executed in English and in the national languages of the signatories.

This MoU includes two Appendixes:

- **Appendix 1**, describing in terms of activities, tasks, skills and knowledge, units of learning outcomes and correspondence between units and associated credit points, the professional qualifications of Interpretive Guide and Interpretive Host. See result R12_Quailfication Design (EN) into the project website www.interpretingeuropeanheritage.com
- **Appendix 2**, meant to outline the mechanisms for the implementation of the MoU.

3. Appendix 1- The new European qualifications established by MoU: Interpretive Host and Interpretive Guide

See result R12_Quailfication Design (EN) into the project website www.interpretingeuropeanheritage.com

4. Appendix 2- Mechanisms for the implementation of the MoU

1. Rules and procedures to monitor and enforce the MoU

1.1 Joint governance committee

1.1.1 The *Joint governance committee* is established to facilitate the implementation of this MoU, to oversee administrative processes, and to monitor the performance of all Parties who have agreed to be bound by the terms and conditions of this MoU to ensure, insofar as it may, that any issues or disagreements arising hereunder are resolved promptly and in a manner consistent with the intent of this MoU.

1.1.2 The *Joint governance committee* will also monitor the processes to implement this MoU in an effective and non discriminatory manner, and continue information exchange by whatever means are considered most appropriate, including regular communication and sharing of information.

1.1.3 The *Joint governance committee* should meet at least annually or as often as required in order to effectively perform its duties and assist in the resolution of eventual disputes. The meetings could be through VOip meetings.

1.1.4 Each organisation undersigning this MoU is represented in the *Joint governance committee* by a minimum of one (1) and a maximum of two (2) Officers/Members/Representatives. The organisations represented in the *Joint governance committee* are the initial contracting Parties of this MoU and all the authorities and organisations which undersign it afterwards.

1.1.5 The organisations interested to participate at this MoU must undersign it and send a copy of the undersigned MoU to the *Joint governance committee*, which will deliberate unanimously, during its subsequent meeting, on the new adhesions to this MoU.

1.1.6 The organisations interested to the adhesion at this MoU have also the possibility to undersign it without participation to the *Joint governance committee*. At this aim, the organisation must specify this will in the framework of the sending of the undersigned MoU to the *Joint governance committee*.

1.1.7 The *Joint governance committee* is based, till its different decision, c/o the Applicant Co-ordinator of the project, *Koan Consulting SI (Spain)*

1.2 Meetings

1.2.1 At *Joint governance committee* meetings a representative of the host organisation shall serve as Chair.

1.2.2 Meeting dates shall be proposed by the hosting organisation, subject to agreement by the others.

1.2.4 In case of face-to-face meetings a two-month notice will be required.

1.2.5 Minutes must be prepared and distributed within two months.

1.3 Finances

1.3.1 There are no fees.

1.3.2 Each organisation is responsible for its own funding.

2. Mechanisms for dialogue and administrative co-operation

The *Joint governance committee* will put in place mechanisms and procedures which will include:

2.1 To review periodically the concerned professional figure;

2.2 To establish the rules and procedures necessary for the application, evaluation and monitoring of the provisions in this MoU. Member of the *Joint governance committee* will keep in regular contact and hold meetings at least annually to review the implementation and effectiveness of the agreement.

2.3 Acting as an information source for the concerned professionals within the participating Countries.

2.5 A means for dispute resolution for the implementation of this MoU.

2.6 Additional tasks as determined by the *Joint governance committee*.

3. Regulations relating to nationality

3.1 Beneficiaries of the provisions of this MoU will be nationals of the Countries represented by the Parties.

4. Revision of agreement

The agreement is ongoing subject to periodic review by the *Joint governance committee*.

5. Notice of termination

If any Party wishes to withdraw from this MoU, it will inform the *Joint governance committee* of this decision by giving 6 months notice in writing.

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“INTERPRETING OUR EUROPEAN HERITAGE”

ECVET for transparency and recognition of learning outcomes and
qualification in European Tourism Sector

Memorandum of Understanding - MoU ECVET for the European qualification in the tourism sector

MoU Adhesion Signature

Place:

Date:

Name of the organisation:

Address of the organisation:

Country:

Telephone number:

Fax number:

E-mail:

Legal representative:

Stamp:

Signature:
