



**CORRIGENDUM of 05/02/2007**

**LIFELONG LEARNING PROGRAMME  
GENERAL CALL FOR PROPOSALS 2007**

**Part II: Administrative and financial information**

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Applicants are also invited to consult the Commission's, National Agency's or the Executive Agency's website.

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# Lifelong Learning Programme: General Call for Proposals 2007

## Part II: Administrative and financial information

### GENERAL PROVISIONS

For the management of the Lifelong Learning programme, the European Commission relies upon the assistance of **National Agencies** for decentralised actions and **the Education, Audiovisual & Culture Executive Agency** for centralised actions.

Both the National Agencies (herewith referred to as NAs) and the Executive Agency (herewith referred to as EA) will be referred to, for parts that concern both entities, as "Agency".

#### **1. TIMETABLE**

Annex I indicates for each action the milestones from submission of the proposal to the starting date of projects and the maximum duration of projects.

No applications will be accepted for projects scheduled to run for a longer period than that specified in this call for proposals.

If after the signing of the agreement and the start of the project it becomes impossible for the beneficiary, for fully justified reasons beyond his control, to complete the project within the scheduled period, an extension to the eligibility period may be granted.

The period of eligibility of costs will start on the day indicated in the grant agreement. Under no circumstances can the eligibility period start before the date of submission of the grant application.

#### **2. BUDGET AVAILABLE**

Annex I provides the detailed breakdown per action of the available budget, which is estimated at EUR 784 million in total.

All budget figures are indicative. Budgetary shifts between the various actions are possible. Furthermore, the Commission, the NA and the EA reserve the right not to distribute all the funds available.

#### **3. ELIGIBILITY CRITERIA**

Only applications that fulfil the eligibility criteria will be considered for a grant. If an application is deemed ineligible, a letter indicating the reasons will be sent to the applicant.

##### **3.1. Eligible countries**

Applicants must be located in a country participating in the Lifelong Learning Programme.

In 2007 the following countries are eligible<sup>1</sup>:

- 27 EU Member States<sup>2</sup>
- Iceland, Liechtenstein, Norway<sup>3</sup>

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<sup>1</sup> Except for the Jean Monnet programme which is open to higher education institutions world wide.

<sup>2</sup> Includes applicants from the following regions: **Canary Islands, Guadeloupe, Martinique, French Guiana, Réunion, Azores, Madeira.** If applicable, the rules governing "Overseas countries and Territories (Annex VI) apply.

- Turkey<sup>4</sup>

The Commission's, NA's or EA's websites can be consulted for updates to the list of participating countries (see section 12 Contacts).

### **3.2. Eligible establishments/bodies/types of beneficiary**

Applications may be submitted either by legal bodies/institutions or by natural persons depending on the action concerned (see Annex I).

For the purpose of this call, all schools and higher education institutions specified by Member States (participating countries), and all institutions or organisations providing learning opportunities which have received over 50 % of their annual revenues from public sources over the last two years, or which are controlled by public bodies or their representatives, are considered to be public bodies. Such organisations are required to sign a declaration of honour stating that their organisation complies with the above-mentioned definition of public body<sup>5</sup>. The Commission and the Agencies reserve the right to request documentation to prove the veracity of this declaration.

In addition, for the Erasmus programme, Higher Education Institutions must hold an Erasmus University Charter (EUC), except if it wants to participate simply as a partner in Multilateral Projects, Networks or Accompanying Measures Projects. For participation in placements in enterprise, Higher Education institutions must hold an "Extended" Erasmus University Charter. However, intermediary organisations involved in Student placements that are not Higher Education Institutions do not have to apply for an Erasmus University Charter.

### **3.3. Eligibility criteria for applications**

To be eligible, applications must:

- (1) comply with the requirements laid down in the Decision of the European Parliament and of the Council establishing the Lifelong Learning Programme, specifically Article 2 (Definitions), Article 4 (Access to the Lifelong Learning programme), as well as the articles regarding access to the sub-programmes: Article 16 (Comenius), Article 20 (Erasmus), Article 24 (Leonardo da Vinci), Article 28 (Grundtvig) and Article 34 (Jean Monnet);
- (2) comply with the application procedures defined in Chapter 9;
- (3) comply with the deadlines set in this call;
- (4) be drawn up in one of the official languages of the European Union<sup>6 7 8</sup>. In case of an application submitted by a consortium<sup>9</sup>, applicants must submit their proposal in the

<sup>3</sup> Subject to the entry into force of the relevant EEA Joint Committee decision. If, by the first of the month of the selection decision, the Joint decision has not entered into force, participants from these countries will not be funded and will not be taken into account with regard to the minimum size of consortia/partnerships.

<sup>4</sup> Subject to the entry into force of Memorandum of understanding. If, by the first of the month of the selection decision, the Memorandum has not entered into force, participants from this country will not be funded and will not be taken into account with regard to the minimum size of consortia/partnerships.

<sup>5</sup> This declaration is included in the application form.

<sup>6</sup> With the exception of mobility proposals submitted in the EFTA/EEA and candidate countries to the European Union. These proposals may be drafted in the national language of the applicant but they must include a compulsory Summary in English, French or German.

<sup>7</sup> Applicants for the Erasmus University Charter are required to provide the Erasmus Policy statement also in English, French or German.

<sup>8</sup> Applicants for the Jean Monnet Programme will submit their applications in either English, French or German.

<sup>9</sup> The Decision establishing the Lifelong Learning programme defines for projects with a "project coordinator" and "project partners" the term "multilateral grouping", which is the equivalent for "consortium",

language used in the consortium for the preparation of the proposal and which will be used for the implementation of the work programme;

- (5) be submitted exclusively using the official Application Form for the relevant activity, be electronically typed and be completed in full;
- (6) be signed by an authorised person;
- (7) be sent to the correct Agency (NA or EA – see Annex I);
- (8) include at least one partner organisation established in an EU Member State, except for unilateral and national projects (except for unilateral and national projects and Jean Monnet multilateral projects).

In addition to the above-mentioned criteria, applications submitted by legal bodies/institutions must:

- (9) be endorsed by the signature of one person in the applicant organisation who is authorised to enter into legally binding commitments on behalf of the applicant organisation;
- (10) for consortia submitting an application for Multilateral Projects, Networks, Accompanying Measures, Studies and Comparative Research and Jean Monnet Projects, include original letters of intent from the mandatory minimum number of partners<sup>10</sup>, carrying the signature of one person in the partner organisation who is authorised to enter into legally binding commitments on behalf of the partner organisation;
- (11) be accompanied by a declaration of honour<sup>11</sup> signed by the authorised signatory in which the latter certifies that the institution is not in a situation of exclusion;
- (12) except for public bodies, be accompanied by a declaration of honour<sup>12</sup> signed by the authorised signatory, attesting to their status as legal persons and to their financial and operational capacity to successfully implement the project described in the proposal submitted.

### **3.4. Additional specific eligibility**

Specific eligibility criteria for the Erasmus programme and the Jean Monnet Programme are contained in Annex II.

## **4. EXCLUSION CRITERIA**

Applicants will be excluded from participating in the call for proposals if they are in any of the following situations<sup>13</sup>:

- a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) they have been convicted of an offence concerning their professional conduct by a judgment which has the force of *res judicata*;
- c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;

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<sup>10</sup> A signed fax version will be accepted at proposal stage. The originals must be available at the moment of establishing the agreement.

<sup>11</sup> This declaration is included in the application form.

<sup>12</sup> This declaration is included in the application form.

<sup>13</sup> In accordance with Articles 93 and 94 of the Financial Regulation.

- d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) they have been the subject of a judgment which has the force of *res judicata* for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations;

Applicants will not be granted financial assistance if, during the grant award procedure, they:

- a) are subject to a conflict of interest (for family, personal or political reason or through national, economic or any other interest shared with an organisation or an individual directly or indirectly involved in the grant award procedure);
- b) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the grant award procedure, or fail to supply this information.

Administrative and financial penalties may be imposed on applicants who are guilty of misrepresentation or are found to have seriously failed to meet their contractual obligations under a previous contract or grant award procedure<sup>14</sup>.

## **5. SELECTION CRITERIA**

The following does not apply to natural persons in receipt of grants.

Applicant must have stable and sufficient sources of funding to maintain their activity throughout the period during which the action is being carried out and to participate in its funding. They must have the professional competencies and qualifications required to complete the proposed action or work programme.

Selected proposals will be subjected to a financial analysis, in connection with which the persons responsible for the proposed actions may be asked to provide additional information and, if appropriate, guarantees.

### **5.1. Operational Capacity**

All applicants, including public bodies, must have the professional competencies and qualifications required to complete the proposed action or work programme.

If required by the "Guide for applicants" or in the application forms, applicants must submit, together with their application the CVs of the applicants/ key staff within each institution of the consortium showing relevant professional experience.

These documents must be provided in one of the official EU languages.

### **5.2. Financial capacity**

Public bodies are considered having the necessary financial and administrative capacity, together with the necessary financial stability, to carry out projects under the Lifelong Learning Programme: they shall not be required to present further documentation to demonstrate this.

Other applicants must have stable and sufficient sources of funding to maintain their activity throughout the period during which the action is being carried out.

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<sup>14</sup> In accordance with Articles 93 to 96 of the Financial Regulation.

In order to permit an assessment of their financial capacity, these applicants must submit, together with their applications:

- for grant applications over EUR 25.000, one copy of the official annual accounts for the most recent financial year<sup>15</sup> for which accounts have been closed.
- for grant applications over EUR 500.000, be accompanied by an external audit report produced by an approved auditor. This report shall certify the accounts for the last year available.

If, on the basis of the documents submitted, the Agency considers that operational or financial capacity has not been proved or is not satisfactory, it may:

- reject the application;
- ask for further information;
- require a guarantee for pre-financing;
- offer a grant agreement without pre-financing;
- offer a grant agreement with payment in instalments.

## **6. AWARD CRITERIA**

Eligible applications will be assessed on the basis of the criteria mentioned in Annex III.

Grants will be awarded on the basis of the budget available and the relative quality of proposals submitted.

All applicants will be informed of the results of the selection in writing.

## **7. FINANCIAL CONDITIONS**

### **7.1. General Financial Conditions**

The decision to award a grant in respect of an Action (project) is formalised through the issue of a Grant Agreement, to be signed between the Agency and the grant beneficiary (the successful applicant).

The Agreement will contain the payment arrangements as well as the bank account or sub-account to which funds will be transferred.

Actions having been awarded a grant may not benefit from any other Community funding for the same action. The grant may not have the purpose or effect of producing a profit for the beneficiary. Grants may not be awarded retrospectively for actions already completed.

A grant of less than the amount requested by the applicant may be awarded. In no case may the allocated amount exceed the amount requested.

Community grants are incentives to carry out projects which would not be feasible without the Community's financial support and are based on the principle of co-financing. For grants with a total value of less than or equal to EUR 25.000, the beneficiary will not have to provide the evidence for co-financing referred to above.

Where the implementation of actions requires the beneficiary to have recourse to procurement procedures, the procedures for low-value contracts as set out in the Community legislation shall apply (for details see Chapter 9.2, which refers to the "Guide for applicants").

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<sup>15</sup> "Official" means accounts certified by an appropriate external body and/or published and/or approved by the organisation's general meeting.

The general conditions will lay down the arrangements and time limits for modification, suspension and termination of the Agreement. Beneficiaries found to have seriously failed to meet their contractual obligations may have their agreements cancelled and/or be subject to financial penalties.

Grant Agreements may be amended only by written additional agreements. Such additional agreements shall not have the purpose or the effect of making changes that would call into question the decision to award the grant or be contrary to the equal treatment of applicants.

## **7.2. Financial Conditions for mobility actions**

For mobility actions, grants are based on various components of costs.

### **7.2.1. Subsistence costs**

Subsistence costs will be considered as a flat rate grant and calculated on the basis of daily, weekly or monthly rates (see Annex V).

These rates represent maximum amounts. To take into account possible co-financing, NA's are allowed to revise amounts downwards to a certain common threshold for each action.

### **7.2.2. Travel costs**

Travel costs, including any entry/exit visas required, will be allocated on the basis of real costs, except for Erasmus student mobility (including placements) and Leonardo training placements. The grants for these actions will be considered a global flat-rate contribution to cover both subsistence and travel costs. The principle of proportionality justifies such an approach in these mass-mobility actions.

### **7.2.3. Other costs**

A number of actions require the clear commitment from the sending organisation to ensure quality in all dimensions (pedagogic as well as logistic) of the mobility period. Such costs can be covered with a system of scales of unit costs (see Annex V).

## **7.3. Financial Conditions for partnerships**

Grants will be awarded in the form of a flat-rate grant to each beneficiary in the partnership as a contribution to all eligible Partnership costs: travel, subsistence during mobility periods and local project activities (See Annex V).

## **7.4. Financial Conditions for Multilateral projects, Networks, Accompanying measures, Studies and Comparative Research and Jean Monnet projects**

Grant applications must include a detailed estimated budget in which all prices are given in euro. Applicants from countries outside the euro zone must use the conversion rates published in the Official Journal of the European Union, series C, on the date of publication of this call for proposals.

The estimated budget for the action attached to the application must have revenue and expenditure in balance and show clearly the costs which are eligible for financing from the Community budget. The applicant must indicate the sources and amounts of any other Community funding received or applied for in the same financial year for the same action or for any other action and for routine activities.

For Multilateral projects, Networks, Accompanying measures and Studies and Comparative Research the maximum rates for staff costs and subsistence costs are indicated in Annex V.

Applicants should base the project budget on real daily staff cost rates which cannot exceed the maximum rate indicated in Table 5e. Any surplus will be considered as ineligible. The veracity of these costs may be the subject of an audit.

Applicants should base the project budget on real daily subsistence rates, which cannot exceed the maximum rate indicated in Table 5f. Any the surplus will be considered as ineligible.

For Jean Monnet projects the amounts presented under staff costs and subsistence costs must be justified by the applicant. If these costs exceed the maximum rates indicated in (see the EA web site), the surplus will be considered ineligible.

The percentage of own resources indicated in the revenue part of the estimated budget is regarded as secured, and the same percentage, as a minimum, must be entered in the revenue section of the final account. As indicated in Annex I, the Community grant will not cover more than 75% of the eligible costs.

## **8. PUBLICITY**

All grants awarded in the course of a financial year must be published on the Internet site of the Community institutions during the first half of the year following the closure of the budget year in respect of which they were awarded. The information may also be published using any other appropriate medium, including the Official Journal of the European Union. The names of individuals having received a grant will not be published in the Official Journal or on the Europa website.

With the agreement of the beneficiary (taking account of whether information is of such a nature as to jeopardise its security or prejudice its financial interests), the following information will be published<sup>16</sup>:

- name and address of the beneficiary;
- subject of the grant;
- amount awarded and rate of funding.

Beneficiaries must clearly acknowledge the European Union's contribution in all publications or in conjunction with activities for which the grant is used. Furthermore, beneficiaries are required to give prominence to the name and logo of the European Commission on all their publications, posters, programmes and other products realised under the co-financed project. If this requirement is not fully complied with, the beneficiary's grant may be reduced.

Beneficiaries are required to:

- ensure access to project details and emerging and final results via a website to be maintained during and for a set period after the end of the contract. The website details should be notified at the beginning of the project and confirmed in the final report;
- make these results available via a European Commission-hosted IT platform as and when this is live.

## **9. PROCEDURE FOR THE SUBMISSION OF PROPOSALS**

### **9.1. Publication**

The call for proposals is published in the Official Journal of the European Union C 313 of 22 December and on the Internet address:

[http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/c\\_313/c\\_31320061220en00420043.pdf](http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/c_313/c_31320061220en00420043.pdf)

### **9.2. Application forms and Guide for applicants**

These documents can be obtained:

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<sup>16</sup> The application forms include an explicit agreement from the applicant allowing the Commission or the Agency to publish the above mentioned data if the proposal is approved.

- on the NA Internet website
- on the EA Internet website : [http://eacea.cec.eu.int/static/en/llp/index\\_en.htm](http://eacea.cec.eu.int/static/en/llp/index_en.htm)
- on the Lifelong Learning Programme Internet website: [http://ec.europa.eu/education/programmes/newprog/index\\_en.html](http://ec.europa.eu/education/programmes/newprog/index_en.html)

### 9.3. Submission of the grant application

9.3.1. Applicants will provide a signed paper version, accompanied by annexes required, which must be sent to the appropriate address mentioned below (see paragraphs 9.3.3 and 9.3.4). This version is clearly identified as the original.

This original (applications sent by fax or colour scanned copies of an original application will not be accepted) shall be presented unbound (so that copies of relevant parts may be made easily) but securely packaged. It must carry the signature of one person in the applicant organisation that is authorised to enter into legally binding commitments on behalf of the applicant organisation. **This signature must be made in blue ink.** The pages shall be numbered using the formulation "page [n] of [total number of pages]"

9.3.2. The original must be sent with:

- For proposals to be sent to the Executive Agency (see annex I), three bound copies plus either one copy on CD ROM or DVD **or** an electronically submitted proposal where the facility exists, identical to the original plus one copy of each of the annexes listed;
- For proposals to be sent to NA (see annex I), see NA website.

9.3.3. The application must be addressed, according to the information provided in Annex I, to **either** the NA of the country in which the applicant institution or the individual is established **or** to the EA.

9.3.4. The addresses of the NAs and the EA are available at:

- [http://ec.europa.eu/education/programmes/llp/contact\\_en.html](http://ec.europa.eu/education/programmes/llp/contact_en.html)

9.3.5. The outer envelope containing the proposal must indicate the following information

- The name of the relevant programme: Comenius, Erasmus, Leonardo Da Vinci, Grundtvig, Transversal Programme, Jean Monnet programme;
- The reference of the specific Action.

9.3.6. All additional information considered necessary by the applicant can be included on separate sheets.

9.3.7. No changes to the application can be made after the application has been submitted. However, if there is a need to clarify certain aspects, the applicant may be contacted for this purpose.

9.3.8. Applicants will be informed of the receipt of their proposal within 30 working days after deadline for submission (see Annex I).

### 9.4. Selection procedures

Annex IV summarizes the different procedures and the type of actions to which they apply.

## 10. APPLICABLE RULES

The following rules are applicable to the administration and financing of the action of the Lifelong Learning programme:

- Decision No 1720/2006/EC of the European Parliament and of the Council of 15 November 2006 (establishing the Lifelong Learning programme);
- Council Regulation (EC, Euratom) No 1605/2002 of 25 June 2002 on the Financial Regulation applicable to the general budget of the European Communities;
- Commission Regulation (EC, Euratom) No 2342/2002 of 23 December 2002 laying down detailed rules for the implementation of Council Regulation (EC, Euratom) No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities, modified most recently by Commission Regulation 1248/2006 of 7 August 2006.

The decision establishing the Lifelong Learning programme shall take precedence over the other applicable rules.

This call has also to be read in conjunction with the "Guide for applicants" and the Application Forms (see section 9.2).

The order of precedence of documents in the context of the Call for proposals are:

- (1) The Decision No 1720/2006/EC establishing the Lifelong Learning programme;
- (2) The official announcement of the Call for proposals EAC/61/2006, published in the Official Journal 2006/C 313/14;
- (3) The text of the Call as published on the Lifelong Learning programme website (see Ch. 12);
- (4) The "Guide for applicants", which includes the "Administrative and Financial rules". These "Administrative and Financial rules" take precedence over any administrative and financial rules included in other chapters of the "Guide for Applicants".
- (5) The "Application forms".

## 11. PROTECTION OF PERSONAL DATA

The grant application will be processed by computer. All personal data (such as names, addresses, CVs, etc.) will be processed in accordance with Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data<sup>17</sup>. Information provided by the applicants necessary in order to assess your grant application will be processed solely for that purpose by the department responsible for the Community grant programme concerned. On the applicant's request, personal data may be sent to the applicant to be corrected or completed. For any question relating to these data, you can contact the appropriate Agency to which the form must be returned. Beneficiaries may lodge a complaint against the processing of their personal data with the European Data Protection Supervisor at any time. ([http://www.edps.europa.eu/00\\_home.htm](http://www.edps.europa.eu/00_home.htm)).

## 12. CONTACTS

Further details on the programme are available:

- from the Lifelong Learning programme website:  
[http://ec.europa.eu/education/programmes/newprog/index\\_en.html](http://ec.europa.eu/education/programmes/newprog/index_en.html);

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<sup>17</sup> Official Journal L 8, 12.1.2001.

- from the NA's of the programme, the list of which is available on the Lifelong Learning programme Web-site;
- from the EA website: <http://eacea.cec.eu.int/index.html> .

### **13. OTHER EUROPEAN COOPERATION PROGRAMMES WITH RELATED OBJECTIVES**

The attention of potential applicants should also be drawn to other Community programmes and initiatives in the field of Higher Education which pursue complementary objectives to those of the Lifelong Learning programme: i.e.:

- The Erasmus-Mundus programme.
- The Tempus programme (a trans-European mobility scheme for university studies) enables universities from EU Member States to cooperate with those in Western Balkans, Eastern Europe and Central Asia, and the Mediterranean partner countries in higher education modernisation projects.
- The EU-US (Atlantis) and the EU-Canada Cooperation Programmes in Higher Education and Vocational Education Training as well as the pilot projects for cooperation in higher education with Japan and Australia aim to promote intercultural understanding and to improve the quality of their human resource development.
- The 7th research framework programme (FP7) of the European Community (EC) for the period 2007- 2013
- The Council regulation (EC) No 1083/2006 of 11 July 2006 laying down general provisions on the European Regional Development Fund, the European Social Fund and the Cohesion Fund and repealing Regulation (EC) No 1260/1999, OJ L 210/25 of 31.07.2006

#### **TRANSITIONAL PROVISIONS**

- 1) The Legal Basis of the Lifelong Learning Programme specifies that actions which are initiated on or before 31 December 2006 on the basis of the Decisions pertaining to the Socrates and Leonardo da Vinci programmes (Phase II) shall be administered in conformity with the provisions of those Decisions.
- 2) In order to allow National Agencies to award grants for actions taking place with the earliest starting date of 15 January 2007 on the 2007 budget, additional closing dates are introduced for:
  - Preparatory Visit grants for all decentralised actions;
  - In-service training grants for Comenius and Grundtvig.
- 3) The additional closing dates are:
  - 2 January 2007, for activities starting on 15 January 2007 at the earliest;
  - 2 February 2007, for activities starting on 15 February 2007 at the earliest;
  - 28 February 2007 for activities starting on 15 March 2007 at the earliest.
- 4) Applicants do not need to reintroduce their grant application. The grant award procedure implemented by the National Agency shall take into account the rules applicable under the Lifelong Learning Programme. The grant may be awarded retrospectively only if the application has been introduced before the closing dates mentioned above.
- 5) The earliest possible starting date for the actions mentioned above, for which grant applications are introduced with closing date of 30 March 2007, is advanced from 1 June 2007 to 15 April 2007.

**ANNEX I BUDGET, CALENDAR, MAXIMUM CONTRIBUTION AND DURATION**

Actions	2007 Indicative budget (MioEUR) (EUR 30)	Estimated number of projects to be selected	Deadline for submission	Where to apply	Who applies	Probable date in 2007 for			Ceilings		Duration of projects		Minimum number** of project partners and from different countries
						Information on the results of selection process	Sending agreement to beneficiaries	Starting date of projects	Maximum Community Amount (EUR)	Maximum Community contribution (%)	Min	Max (1)	
<b>Comenius Programme</b>													
Mobility	24,793												
School education staff		Not appl.	30/03/07*	NA	ind	June	June	June	See NA web	See NA web	(a1)	(a2)	Not appl.
Future teachers		Not appl.	30/03/07	NA	ind	July	August	September	See NA web	See NA web	(b1)	(b2)	Not appl.
Partnerships													
Renewal applications (2)													
1-year renewals (3rd year of ongoing multilateral partnerships)	19,036	Not appl.	30/03/07	NA	LB	August	September	October	See NA web	See NA web		1 year	3
2-year renewals (2nd and 3rd year of ongoing multilateral partnerships)	39,603	Not appl.	30/03/07	NA	LB	August	September	October	See NA web	See NA web		2 years	3
New applications									See NA web	See NA web			
New bilateral partnerships	6,447	Not appl.	30/03/07	NA	LB	August	September	October	See NA web	See NA web		2 years	2
New multilateral partnerships	25,789	Not appl.	30/03/07	NA	LB	August	September	October	See NA web	See NA web		2 years	3
Preparatory visits for decentralised actions		Not appl.	contact NA	NA	LB	contact NA	contact NA	contact NA	See NA web	See NA web	(c)	(c)	Not appl.
Multilateral projects	9,41	40	30/03/07	EA	LB	July	September	October	150.000/year	75%		2 years	3 (3)
Networks	2,843	8	30/03/07	EA	LB	July	September	October	150.000/year	75%		3 years	10
Accompanying measures Projects	0,409	3	30/04/07	EA	LB	August	October	November	150.000/year	75%		1 year	Not appl.

NA : National Agencies

LB : legal bodies

\* 30/03/07 first deadline, followed by 31/05/07 and 31/10/07

EA : EAC Executive Agency

Ind : individuals

\*\* See "Guide for applicants" or "Application forms" for any additional requirement

(1) Possibility to extend the eligibility period by 6 months on request for Multilateral Projects, Networks, Studies and Comparative Research, Accompanying measures

(a1) Up to 1 week, (a2) Up to 6 weeks

(2) No new participants are allowed to join existing partnerships at renewal stage.

(b1) 3 months (b2) 1 academic year

(3) At least one eligible educational staff training institution in each of the partners

(c) Up to 1 week

Actions	2007 Indicative budget (MioEUR) (EUR 30)	Estimated number of projects to be selected	Deadline for submission	Where to apply	Who applies	Probable date in 2007 for			Ceilings		Duration of projects		Minimum number** of project partners and from different countries	
						Information on the results of selection process	Sending agreement to beneficiaries	Starting date of projects	Maximum Community Amount (EUR)	Maximum Community contribution (%)	Min	Max (1)		
<b>Erasmus Programme</b>														
Erasmus University Charter		Not appl.	28/02/07	EA	LB	May								Not appl.
Mobility: students and teachers	313,764	Not appl.	30/03/07	NA	LB	See NA web	See NA web	July	See NA web	See NA web	(a1)	(a2)		Not appl.
Organisation of Mobility	28,332	Not appl.	30/03/07	NA	LB	See NA web	See NA web	July	See NA web	See NA web	Not appl.	Not appl.		Not appl.
Intensive language courses	1,565	Not appl.	30/03/07	NA	LB	See NA web	See NA web	July	See NA web	See NA web	(b1)	(b2)		Not appl.
Intensive programmes	7,896	Not appl.	30/03/07	NA	LB	See NA web	See NA web	July	See NA web	See NA web	2 weeks	6 weeks		3
Preparatory visits for decentralised actions		Not appl.	contact NA	NA	LB	See NA web	See NA web	See NA web	See NA web	See NA web	Not appl.	Not appl.		Not appl.
Multilateral projects	10,842	45	30/03/07	EA	LB	July	September	October	150.000/year (2)	75%		2 years (3)		3
Networks	7,16	20	30/03/07	EA	LB	July	September	October	150.000/year	75%		3 years		31 (4)
Accompanying measures Projects	0,873	7	30/04/07	EA	LB	August	October	November	150.000/year	75%		1 year		Not appl.
<b>Leonardo da Vinci Programme</b>														
Mobility: IVT, People in the Labour Market (PLM), VET Professionals	128,116	Not appl.	30/03/07	NA	LB	June	June	July	See NA web	See NA web	6 months (c)	2 years (c)		2
Preparatory visits for decentralised actions		Not appl.	contact NA	NA	LB	See NA web	See NA web	See NA web	See NA web	See NA web	1 day	1 week		Not appl.
Multilateral projects: Transfer of innovation	75,483	315	30/03/07	NA	LB	September	September	October	150.000/year	75%	1 year	2 years		3
Multilateral projects: Development of innovation	7,16	18	30/03/07	EA	LB	July	September	October	250.000/year	75%	18 months	2 years		3
Networks	3,682	10	30/03/07	EA	LB	July	September	October	150.000/year	75%	2 years	3 years		3
Accompanying measures	0,614	5	30/04/07	EA	LB	August	October	November	150.000/year	75%	1 month	1 year		Not appl.

NA : National Agencies  
EA : EAC Executive Agency

LB : legal bodies  
Ind : individuals

\*\* See "Guide for applicants" or "Application forms" for any additional requirement

- (1) Possibility to extend the eligibility period by 6 months on request for Multilateral Projects, Networks, Studies and Comparative Research, Accompanying measures  
(2) For modernisation of higher education projects, the maximum amount is 300.000 euros per year  
(3) Possibility of one additional year without funding for Curriculum Development projects and for Development of study programmes  
(4) Except in duly justified cases

- (a1) Students 3 months (2 weeks for placements of students in short term higher vocational education); Teaching assignments: minimum 5 teaching hours; Staff training: 1 week except duly justified cases (a2) Students: 12 months; Teaching and other staff: 6 weeks.  
(b1) 60 teaching hours (b2) 6 weeks  
(c) Mobility: VETPro 1-6 weeks; Training placements IVT : 2-39 weeks; PLM : 2-26 weeks

Actions	2007 Indicative budget (MioEUR) (EUR 30)	Estimated number of projects to be selected	Deadline for submission	Where to apply	Who applies	Probable date in 2007 for			Ceilings		Duration of projects		Minimum number** of project partners and from different countries
						Information on the results of selection process	Sending agreement to beneficiaries	Starting date of projects	Maximum Community Amount (EUR)	Maximum Community contribution (%)	Min	Max (1)	
<b>Grundtvig Programme</b>													
Mobility: adult education staff	2,046	Not appl.	30/03/07*	NA	ind	June	June	June	See NA web	See NA web	(a1)	(a2)	Not appl.
Partnerships													
Renewal (2)	7,438	Not appl.	30/03/07	NA	LB	August	September	October	See NA web	See NA web	1 year or 2 years	1 year or 2 years	3
New	11,88	Not appl.	30/03/07	NA	LB	August	September	October	See NA web	See NA web		2 years	3
Preparatory visits for decentralised actions		Not appl.	See NA web	NA	LB	See NA web	See NA web	See NA web	See NA web	See NA web	(b)	(b)	Not appl.
Multilateral projects	14,36	60	30/03/07	EA	LB	July	September	October	150.000/year	75%		2 years	3
Networks	2,557	7	30/03/07	EA	LB	July	September	October	150.000/year	75%		3 years	10
Accompanying measures	0,256	2	30/04/07	EA	LB	August	October	November	150.000/year	75%		1 year	Not appl.
<b>Transversal Programme</b>													
<b>Key Activity 1: Policy Cooperation and Innovation</b>													
Mobility: education decision makers	3,068	Not appl.	30/04/07	NA	LB	July	See NA web	See NA web	See NA web	See NA web		(c)	Not appl.
Studies and comparative research	3,171	5	30/04/07	EA	LB	August	October	November	250.000/year	75%		3 years	6
<b>Key Activity 2: Languages</b>													
Multilateral projects: new materials / online courses / awareness raising	6,447	16	30/04/07	EA	LB	August	October	November	250.000/year	75%		2 years	3 (3)
Networks	2,5	7	30/04/07	EA	LB	August	October	November	150.000/year	75%		3 years	10
Accompanying measures	0,2	2	30/04/07	EA	LB	August	October	November	150.000/year	75%		1 year	3
<b>Key Activity 3: ICT</b>													
Multilateral projects	6,5	16	30/04/07	EA	LB	August	October	November	250.000/year	75%		2 years	3
Networks	2	6	30/04/07	EA	LB	August	October	November	150.000/year	75%		3 years	3
<b>Key Activity 4: Dissemination and Exploitation of Results</b>													
Multilateral projects	2,864	12	30/04/07	EA	LB	August	October	November	150.000/year	75%		2 years	3 (d)

NA : National Agencies

LB : legal bodies

\* 30/03/07 first deadline, followed by 31/05/07 and 31/10/07

EA : EAC Executive Agency

Ind : individuals

\*\* See "Guide for applicants" or "Application forms" for any additional requirement

(1) Possibility to extend the eligibility period by 6 months on request for Multilateral Projects, Networks,

(a1) Up to 1 week (a2) Up to 6 weeks

Studies and Comparative Research, Accompanying measures

(b) Up to 1 week

(2) No new participants are allowed to join existing partnerships at renewal stage.  
 (3) For languages from non-participating countries: at least one internationally recognised educational institution with expertise in the teaching and learning of the target language(s), located in one (or more) participating country(ies) must be present.

(c) Mobility: 1 week  
 (d) or single European association

Actions	2007 Indicative budget (MioEUR) (EUR 30)	Estimated number of projects to be selected	Deadline for submission	Where to apply	Who applies	Probable date in 2007 for			Ceilings		Duration of projects		Minimum number** of project partners and from different countries
						Information on the results of selection process	Sending agreement to beneficiaries	Starting date of projects	Maximum Community Amount (EUR)	Maximum Community contribution (%)	Min	Max (1)	
Jean Monnet Programme													
<b>Key Activity 1: Jean Monnet Action - Art. 3.3(a)</b>													
Unilateral projects	3,12												
Jean Monnet Chairs			15/03/07	EA	LB	June	July	September	45.000	75%		5 years	Not appl.
Centres of Excellence			15/03/07	EA	LB	June	July	September	75.000	75%		5 years	Not appl.
Modules			15/03/07	EA	LB	June	July	September	21.000	75%		5 years	Not appl.
Unilateral projects: Associations of Professors and Researchers	0,061	3	15/03/07	EA	LB	June	July	September	25.000	75%		5 years	Not appl.
Unilateral projects: Information and research activities	1,025	21	15/03/07	EA	LB	June	July	September	50.000	75%		1 year	Not appl.
Multilateral projects: Research groups	0,205	2	15/03/07	EA	LB	June	July	September	100.000	75%		2 years	3
<b>Total</b>	<b>784,102</b>												

NA : National Agencies  
 EA : EAC Executive Agency

LB : legal bodies  
 Ind : individuals

\*\* See "Guide for applicants" or "Application forms" for any additional requirement

(1) Possibility to extend the eligibility period by 6 months on request for Multilateral Projects, Networks, Studies and Comparative Research, Accompanying measures

## **ANNEX II – ADDITIONAL SPECIFIC ELIGIBILITY CRITERIA FOR THE ERASMUS PROGRAMME AND THE JEAN MONNET PROGRAMME**

### **Erasmus programme**

#### 1. Mobility of Individuals - Mobility of Students for the Purposes of Studying

- The student must be enrolled at least in the second year of higher education studies
- The student must be registered in a higher education institution in order to follow higher education studies leading to a recognised degree or other recognised tertiary level qualification up to and including the level of doctorate
- Erasmus student mobility is based on inter-university agreements between participating institutions each of which holds an Erasmus University Charter
- Full recognition must be given given by the home institution for the period spent abroad.
- No university fees (for tuition, registration, examinations, access to laboratory and library facilities, etc.) are to be paid at the host institution.
- The student must be national of a participating country or recognised by the country in which he/she is resident as refugee, stateless person or permanent resident.

#### 2. Mobility of Individuals - Student Placements in Enterprises, Training Centres, Research Centres and Other Organisations

- Students must be registered in higher education institutions which hold an Erasmus University Charter (standard or extended)
- The student must be national of a participating country or recognised by the country in which he/she is resident as refugee, stateless person or permanent resident

#### 3. Mobility of Individuals - Teaching Assignments for Teaching Staff in Higher Education Institutions

- Teaching staff must be from and institution holder of a Erasmus University Charter and going to another institution holder of a EUC

#### 4. Mobility of Individuals - Staff Training for Teaching and Other Staff in Higher Education Institution and Enterprises

- Administrative, teaching and non-teaching staff must be from an institution holder of a Erasmus University Charter and must go to another institution holder of a EUC or to an enterprise
- Staff from enterprises must go to an institution holder of a Erasmus University Charter

#### 5. Mobility of Individuals - Organisation of Mobility

- The institution has to be a higher education institutions which have been awarded an Erasmus University Charter or a placement consortia

#### 6. Mobility of Individuals - Erasmus Intensive Language Courses

- By exception, even if courses are normally organised by higher education institutions, but other organisations specialised in language training in the less widely known languages of the participating countries are also eligible for this action

## **Jean Monnet programme**

### 1. Jean Monnet Chairs

- Jean Monnet Chairs are teaching posts with a specialisation in European integration studies.
- Jean Monnet Chairholders must teach a minimum of 120 hours per academic year in the field of European integration studies.
- Jean Monnet Chairholders must have the rank of professor/senior lecturer and may not be a "visiting professor" at the establishment in question.

### 2. Ad personam Jean Monnet Chairs

- *Ad personam* Jean Monnet Chairs are reserved for experienced professors with a long-term teaching and research background and/or major organisational achievements in European integration studies. Their high-level status must be recognised at international level.
- The *ad personam* Jean Monnet Chairholder must hold the rank of full professor.
- *Ad personam* Jean Monnet Chairs must teach regular courses in European integration studies and must be responsible for organising regular reflection activities on the European integration process (conferences, seminars, roundtables).

### 3. Jean Monnet Centres of Excellence

- The Jean Monnet Centre of Excellence must pool scientific, human and documentary resources for European integration studies within one or more universities;
- The university/universities must designate a Jean Monnet Chair to assume academic responsibility for the Centre of Excellence. Therefore, only universities that already have been granted a Jean Monnet Chair are eligible to apply for a Jean Monnet Centre of Excellence.

### 4. Jean Monnet Teaching Modules

- A Jean Monnet Module is a course in the field of European integration studies that has a minimum duration of 30 teaching hours;
- A Jean Monnet Teaching Module must take the form of general (introductory) courses on European integration (in particular at universities that do not yet have a highly developed course offering in the field), of highly specialised teaching on European Union developments (in particular at universities that do already have a highly developed course offering in the field), and of summer courses..

### 5. Associations of professors, teachers and researchers specialising in European integration

- The applicant associations must be officially registered and have independent legal status at the time their application is submitted;
- The explicit purpose of the association must be to contribute to the study of the European integration process at national or transnational level;
- The association must have an interdisciplinary character;
- The association must be open to all interested professors, lecturers, teachers and (young) researchers in the field of European integration studies.

### 6. Researchers specialising in European integration studies abroad

- Applications must be submitted by the (home) universities, institutions or associations that are responsible for the mobility of the researcher. Applications from individuals will not be accepted;

- Applications from a university must be signed by (a) the president/rector/vice-chancellor of the applicant institution, (b) the professor responsible for the research at the home university, and (c) the researcher concerned, if already identified. Applications must mention the host university and be accompanied by a letter of intent from the competent professor at the host university;
- Applications from associations of professors, teachers and researchers specialising in European integration studies must be signed by the president and must mention the procedures for the administration and selection of grants.

7. Information and research activities with the aim of promoting discussion, reflection and knowledge about the process of European integration

- Applicants must be universities, other establishments of higher education or national, regional and transnational associations that bring together professors, teachers and researchers specialising in European integration studies;
- Projects under this heading must cover the organisation of conferences, seminars and roundtables and/or summer schools.

8. Multilateral research groups in the field of European integration

- Multilateral research groups must involve a partnership between at least three Jean Monnet Chairs from at least three different countries. Multilateral research groups may involve, as partners, national and transnational associations that bring together professors, teachers and researchers specialising in European integration studies;
- Multilateral research groups must lead to an integrated academic network, involving joint research and the organisation of joint seminars, debates and meetings. The activities of the multilateral research groups must lead to the production of a major academic publication by the end of the eligibility period.

### ANNEX III: AWARD CRITERIA

#### 1. Award criteria for Lifelong Learning Programme: Mobility, Partnerships, Multilateral and Network Projects (sectoral programmes and transversal programme), Accompanying Measures and Studies and Comparative Research Projects<sup>18</sup>

Multilateral projects, Networks, Studies and Comparative Research, Accompanying measures	Partnerships	Mobility
1. QUALITY OF THE METHODOLOGY AND THE WORK PROGRAMME	1. QUALITY OF THE METHODOLOGY AND THE WORK PROGRAMME	1. QUALITY OF THE METHODOLOGY AND THE WORK PROGRAMME
The objectives are clear, realistic and address a relevant issue and identified needs; the methodology is appropriate to achieving the objectives; the work programme defines and distributes tasks / activities among the partners in such a way that the results will be achieved on time and to budget.	The objectives of the partnership are clear, realistic and address a relevant subject; the methodology is appropriate for achieving the objectives and suitable for the partnership type in question; the activity plan defines and distributes tasks among the partners in such a way that the results can be achieved and all partners are actively involved.	Leonardo da Vinci Mobility: The objectives are clear, realistic and address a relevant need; the work-programme is appropriate to achieving the objectives; the work-programme defines and distributes tasks/activities among the partners in such a way that the quality of the mobility experience of the individual is ensured. (ref. general mobility charter)
2. INNOVATIVE CHARACTER	2. INNOVATIVE CHARACTER	2. INNOVATIVE CHARACTER
The proposal will provide something new in terms of learning opportunities, skills development, access to information, etc and / or seeks to find solutions to actual identified needs of the consortium partners and those of the targeted beneficiaries. It will achieve this by means of either adapting and transferring existing solutions to cope with the identified issue/needs or develop a brand new solution whenever such options are not yet available in one or several of the countries participating in the Lifelong Learning Programme.	Not applicable	Not applicable
3. QUALITY OF THE CONSORTIUM	3. QUALITY OF THE CONSORTIUM	3. QUALITY OF THE CONSORTIUM

<sup>18</sup> Applicants are invited to consult the Agency's website for information on the weighing criteria.

<p>The consortium includes all the skills and competences required to carry out all aspects of the work programme, and there is an appropriate balance across the partners in terms of their involvement in the activities defined.</p>	<p>There is an appropriate balance between partners in terms of their competences and their involvement in the activities defined. Appropriate measures have been planned to ensure effective communication and cooperation. <b>This criterion does not apply to renewal applications, as it has already been assessed.</b></p>	<p>Not applicable</p>
<p>4. EUROPEAN ADDED VALUE</p>	<p>4. EUROPEAN ADDED VALUE</p>	<p>4. EUROPEAN ADDED VALUE</p>
<p>There are clear benefits from the implementation of a European approach, rather than a national or regional one, and these benefits are specified in the proposal and reflected in the work programme.</p>	<p>For Partnerships, the impact and benefits of European cooperation on the participating institutions are clear and well defined. <b>This criterion does not apply to renewal applications, as it has already been assessed.</b></p>	<p><b><u>Mobility: Comenius Assistantships</u></b></p> <ul style="list-style-type: none"> <li>- The Assistant describes the benefits that will be derived from this mobility and provides a convincing motivation to contribute to the work of the host institution and community life.</li> <li>- The Host School describes the benefits that will be derived from hosting an Assistant and provides a convincing motivation to host an Assistant.</li> </ul> <p><b><u>Mobility: Comenius &amp; Grundtvig in-service training</u></b></p> <p>The potential of the training activity to enhance the European dimension of the applicant's professional development is clear and well defined.</p> <p><b><u>Mobility: Leonardo da Vinci for Trainees undergoing Initial Vocational Training (IVT)</u></b></p> <p>Expected impact on personal growth (active citizenship), intercultural and language competences is clear and well defined.</p> <p>Use of Europass is foreseen.</p> <p><b><u>Mobility: Leonardo da Vinci for People in the Labour Market (PLM)</u></b></p> <p>Expected impact on personal growth (active citizenship), intercultural and language</p>

		<p>competences is clear and well defined.</p> <p>Use of Europass is foreseen.</p> <p><b><u>Mobility: Leonardo da Vinci for Professionals in Vocational Education and Training (VETPRO)</u></b></p> <p>Expected impact on the European dimension of the home institution is clear and well defined.</p> <p>Use of Europass is foreseen.</p>
5. THE COST-BENEFIT RATIO	5. THE COST-BENEFIT RATIO	5. THE COST-BENEFIT RATIO
The proposal demonstrates value for money in terms of the activities planned and the budget associated with them.	Not relevant for Partnerships: <b>lump sums</b> are granted to different types of Partnerships, depending on number of mobilities planned. Applicants do not produce a budget.	For all mobility activities, the budget items based on real costs are realistic and demonstrate value for money in relation to the funded activity. NB: This criterion does not apply to subsistence costs, for which the grant contribution is based on scales of unit costs
6. IMPACT AND RELEVANCE OF THE RESULTS	6. IMPACT AND RELEVANCE OF THE RESULTS	6. IMPACT AND RELEVANCE OF THE RESULTS
The proposal is clearly positioned in one of the priority areas in the Call for Proposals and also addresses the broader objectives of the Lifelong Learning Programme. The results are relevant and the short- and long-term impact on the identified target audience is likely to be significant.	The results are relevant and the expected impact on the on both Partnership institutions and on individual participants is clear and well defined. The partnership has defined an approach to evaluate whether the aims of the partnership have been met and the expected impact has been achieved.	<p><b><u>Mobility: Comenius Assistantships</u></b></p> <ul style="list-style-type: none"> <li>- The expected impact on personal and professional competences including languages and intercultural benefits is clearly defined by the candidate Assistant.</li> <li>- The expected impact and concrete outcomes that the host school wishes to achieve are clearly defined.</li> </ul> <p><b><u>Mobility: Comenius &amp; Grundtvig in-service training</u></b></p> <p>There is a clear match between the training selected and the applicant's training needs which can be expected to have an impact on their professional development and the general performance and working environment of their institution. Their participation in the training could also contribute to the development of future</p>

		<p>partnerships or projects.</p> <p><b><u>Mobility: Preparatory Visits for Partnerships</u></b></p> <p>The applicant makes a clear link between the activities of his/her home institution and the content of the preparatory visit.</p> <p><b><u>Mobility: Leonardo da Vinci for Trainees undergoing Initial Vocational Training (IVT)</u></b></p> <p>There is a clear match between the training selected and the applicant's training needs.</p> <p>Expected impact on personal and professional competences.</p> <p><b><u>Mobility: Leonardo da Vinci for People in the Labour Market (PLM)</u></b></p> <p>There is a clear match between the training selected and the applicant's training needs.</p> <p>Expected impact on personal and professional competences.</p> <p>Expected impact of the general outcome on practices within the specific vocational field.</p> <p><b><u>Mobility: Leonardo da Vinci for Professionals in Vocational Education and Training (VETPRO)</u></b></p> <p>Expected impact of the general outcome, notably development of the specific vocational field.</p> <p>Expected impact on the increase of quality of training.</p>
7. QUALITY OF THE DISSEMINATION AND EXPLOITATION PLAN	7. QUALITY OF THE DISSEMINATION AND EXPLOITATION PLAN	7. QUALITY OF THE DISSEMINATION AND EXPLOITATION PLAN
The planned dissemination and exploitation activities will ensure optimal use of the results beyond the participants in the project, during and beyond the lifetime of the project.	The planned dissemination and exploitation activities are well defined and ensure optimal use of the results in the participating organisations and, if possible, in the wider community during	The likely multiplier capacity of the trained person <b>and/or the partner institutions</b> is clear and well defined together with a willingness to disseminate the results of their training activity.

	and beyond the lifetime of the partnership. <b>This criterion does not apply to renewal applications, as it has already been assessed.</b>	
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## 2. Award criteria for the Erasmus University Charter

- Clarity and completeness of the Erasmus Policy Statement :
- Quality of arrangements for support of mobility: recognition, language preparation, monitoring, information, accommodation facilities, etc.

## 3. Award criteria for the Jean Monnet programme

### 1. IMPACT AND RELEVANCE OF THE RESULTS

- Likely impact of the activities on education and/or training at the European level;

### 2. QUALITY OF THE METHODOLOGY AND THE WORK PROGRAMME

- Quality and detail of the planned teaching, research and/or debating activities (with particular attention to the academic added value, the multidisciplinary synergies, the innovating character and the openness to civil society).

### 3. QUALITY OF THE APPLICANTS OR CONSORTIUM

- Quality (excellence) of the academic profile (CVs) in the specific field of European integration studies.

#### ANNEX IV: SELECTION PROCEDURES

	<i>National Agency Procedure 1 – NA1</i>	<i>National Agency Procedure 2 – NA2</i>	<i>Commission Procedure - COM</i>
<i>Applicable to (typology of project)</i>	<ul style="list-style-type: none"> <li>❖ Transnational mobility</li> <li>❖ Bilateral and multilateral partnerships</li> </ul>	<ul style="list-style-type: none"> <li>❖ Leonardo da Vinci - Multilateral Projects for Transfer of Innovation</li> </ul>	<ul style="list-style-type: none"> <li>❖ Multilateral projects and networks</li> <li>❖ Observation and analysis</li> <li>❖ Operating grants</li> <li>❖ Unilateral and national projects (transversal programme &amp; Jean Monnet)</li> <li>❖ Accompanying Measures</li> </ul>
<i>To whom the application has to be sent<sup>19</sup></i>	The appropriate <u>National Agency</u> of each applicant institution or individual	The relevant <u>National Agency</u> of the coordinator of the proposal	The <u>Education, Audiovisual and Culture Executive Agency</u>
<i>Main steps of the procedure</i>	<ul style="list-style-type: none"> <li>• Evaluation of proposals according to both formal (<u>eligibility</u> and <u>exclusion criteria</u>) and quality criteria (<u>selection</u> and <u>award criteria</u> which are defined within the specific Calls for Proposals) by National agencies</li> <li>• Approval of the selection list by National agencies</li> <li>• Allocation of financial grants to the selected beneficiaries by National agencies</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation of proposals according to both formal (eligibility and exclusion criteria) and quality criteria (selection and award criteria) by National agencies</li> <li>• Submission to the Commission of a shortlist of applications which it proposes to accept</li> <li>• Approval of the selection list by the Commission</li> <li>• Allocation of financial grants to the selected projects by National agencies</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation of proposals according to both formal (eligibility and exclusion criteria) and quality criteria (selection and award criteria) by the Executive agency</li> <li>• Approval of the selection list) by the Executive agency</li> <li>• Allocation of financial grants to the selected projects) by the Executive agency</li> </ul>

<sup>19</sup> Before sending the application, the applicant must check within the Call for Proposals to which Agency the proposal has to be sent

## **ANNEX V: SCALE OF UNIT COSTS AND LUMP SUMS**

### **1. MOBILITY - SUBSISTENCE**

Erasmus, Leonardo da Vinci, Grundtvig, Comenius, Transversal Programme

#### **1.1 Subsistence costs relative to the mobility of the individual**

Support to subsistence costs is calculated on the basis of scales of unit costs of the host country taking into account:

- The daily rate for a country of index 100, which is determined in such a way that the beneficiary is supposed to bring in own sources of financing;
- The cost of living in the different countries as provided by Eurostat;
- The different categories of participants in mobility actions, such that scales of unit costs of adults or professionals will be higher than those for students or pupils;
- A longer stay will induce relatively lower costs than a short stay (i.e.: a weekly rate may not result from a simple multiplication of the daily rate).

For Grundtvig and Comenius mobility, the support to subsistence cost covers also insurance costs of the persons in mobility. For Erasmus student Mobility and Leonardo training placements, the support to subsistence cost covers also travel cost.

#### **1.2 Proposed maximum amounts**

The scales of unit costs thus calculated represent maximum amounts.

In order to take account the possible national, regional and local co-financing and other national features, the national authorities in cooperation with the National Agencies can decide guidelines on the rates to be applied while respecting the common criteria laid down at community level.

The National Agency may use lower amounts. However, in order to respect the principle of equal treatment, divergences between countries should remain within margins. In this sense thresholds (variation margins) below which the National Agency may not go will be defined at Community level.

In the case of student grants, the Legal Basis of the Lifelong Learning programme stipulates that the average student grant should be maintained at an average of 200 EUR per month in real terms for the duration of the programme. In order to comply with this provision, the countries that in 2006 were below this amount will increase the average grant in 2007 by at least two thirds of the rate of increase of their budget for student grants. In successive years, if need be, these countries will increase the average grant until the target of 200 euro per month is met.

In addition the specificities of the actions of each sub-programme must be taken into account. Therefore variation margins will have to be defined for each action. In certain actions margins may be low while in other action (e.g. Erasmus student mobility) margins can be broader in view of the many types of national co-financing.

To take account of persons with special needs, the National Agency will have the possibility to apply higher rates in accordance with criteria defined in each action. It is proposed that the National Agencies make use of the rules and scales applicable at Community level.

**Table 5a: Lifelong Learning Programme - Individual mobility – Subsistence\* – Maximum rates per host country and category of beneficiaries\*\***

\* Insurance included for Individual Mobility in Comenius and Grundtvig, Travel Included for Erasmus student Mobility and Leonardo training placements

\*\* See NA website to verify the maximum amounts applied in each country

	Cost of living index	ADULTS, STAFF (travel excluded)						YOUNG PEOPLE				
		Daily rate	Weekly rate			Monthly rate		Weekly rate		Monthly rate (travel included)		
			1st week	2nd week	3rd, 4th, 5th and 6th week	1st month	2nd and further months	Up to 4 weeks (travel excluded)	Up to 4 weeks (travel included)	1st month	2nd and further months	3 to 12 months (Erasmus studies)
Belgique/Belgie - BE	100,00	150	750	350	200	1500	800	175	300	1200	700	560
Bulgaria- BG	56,63	85	425	198	113	849	453	99	170	680	396	317
Ceska Republika - CZ	90,56	136	679	317	181	1358	725	158	272	1087	634	507
Danmark - DK	135,88	204	1019	476	272	2038	1087	238	408	1631	951	761
Deutschland - DE	100,20	150	752	351	200	1503	802	175	301	1202	701	561
Eesti - EE	80,26	120	602	281	161	1204	642	140	241	963	562	449
Ellas - EL	93,00	140	698	326	186	1395	744	163	279	1116	651	521
Espana -ES	101,20	152	759	354	202	1518	810	177	304	1214	708	567
France - FR	119,00	179	893	417	238	1785	952	208	357	1428	833	666
Ireland - IE	122,40	184	918	428	245	1836	979	214	367	1469	857	685
Italia - IT	111,80	168	839	391	224	1677	894	196	335	1342	783	626
Kypros - CY	91,96	138	690	322	184	1379	736	161	276	1104	644	515
Latvija - LV	76,12	114	571	266	152	1142	609	133	228	913	533	426
Lithuania - LT	77,07	116	578	270	154	1156	617	135	231	925	540	432
Luxembourg - LU	100,00	150	750	350	200	1500	800	175	300	1200	700	560
Magyarország - HU	89,99	135	675	315	180	1350	720	157	270	1080	630	504
Malta - MT	89,55	134	672	313	179	1343	716	157	269	1075	627	501
Nederland - NL	109,70	165	823	384	219	1646	878	192	329	1316	768	614
Oesterreich - AT	107,10	161	803	375	214	1607	857	187	321	1285	750	600
Polska - PL	81,38	122	610	285	163	1221	651	142	244	977	570	456
Portugal - PT	91,50	137	686	320	183	1373	732	160	275	1098	641	512
Rumania- RO	63,78	96	478	223	128	957	510	112	191	765	446	357
Slovenija -SI	82,97	124	622	290	166	1245	664	145	249	996	581	465
Slovensko -SK	92,94	139	697	325	186	1394	744	163	279	1115	651	520
Suomi - FI	117,70	177	883	412	235	1766	942	206	353	1412	824	659
Sverige - SE	112,38	169	843	393	225	1686	899	197	337	1349	787	629
United Kingdom - UK	143,76	216	1078	503	288	2156	1150	252	431	1725	1006	805
Island - IS	139,23	209	1044	487	278	2088	1114	244	418	1671	975	780
Liechtenstein - LI	125,12	188	938	438	250	1877	1001	219	375	1501	876	701
Norge - NO	140,43	211	1053	492	281	2106	1123	246	421	1685	983	786
Turkey - TR	83,60	125	627	293	167	1254	669	146	251	1003	585	468

## 2. MOBILITY – TRAVEL COSTS

Erasmus, Leonardo da Vinci, Grundtvig, Comenius, Transversal Programme

### 2.1 Travel costs

Travel costs are allocated on the basis of real costs except for Erasmus student mobility and Leonardo training placements, where the grant resulting from the calculation for subsistence costs will also cover travel costs (see Table 5a). However, if individuals reside in one of the territories listed in the Overseas Association Decision of the Council (see Annex VI) or have one of these territories as destination, travel costs will always be allocated on the basis of real costs.

In the case of Leonardo placement grants it is acceptable that the duration of the period abroad is shorter than one month. In these cases, the situation can occur that the flat-rate contribution covering both subsistence and travel (see Table 5a) is too low to allow a decent coverage of the placement period (particularly for long distances to countries with low cost of living index). In that case, the NA may allocate funds separately: a) for subsistence costs applying the maximum weekly rates (excluding travel) for young people in the table 5a and b) for travel on the basis of real costs.

## 3. MOBILITY – OTHER COSTS

Erasmus, Leonardo da Vinci, Comenius, Grundtvig

### 3.1 Other costs

A number of actions require the clear commitment from the sending organisation to ensure quality in all dimensions (pedagogic as well as logistic) of the mobility period. Such costs can be covered by either flat-rate amounts or scales of unit costs. This support is given to the **sending** organisation, not the individual.

### 3.2 Proposed amounts

All amounts are in EUR per person/beneficiary unless otherwise indicated. This category covers also insurance costs of the persons in mobility, except for Grundtvig and Comenius mobility, where insurance is covered by subsistence costs.

#### 3.2.1 Leonardo da Vinci programme

**Table 5b: Leonardo Da Vinci – Maximum Scale of Unit costs to apply to calculate the grant to sending institutions for the Organisation of Mobility**

Maximum grants for management costs	Flat-rate contribution for managing the mobility action (sending participants abroad) per participant	300 €/beneficiary
Maximum grants for preparation costs	Flat-rate contribution for pedagogic, linguistic and cultural preparation per participant if requested	500 €/beneficiary

The National Agencies will determine the amounts of the scale of unit cost to be used in their country.

### 3.2.2 Erasmus programme

#### *3.2.2.1 Grant to sending institutions for the Organisation of Mobility*

Maximum Scale of Unit costs to apply to calculate the grant to sending institutions for the Organisation of Mobility. Scales are defined per group of persons to be sent abroad.

**Table 5c: Erasmus – Maximum contribution to the costs incurred by Higher Educations Institutions to ensure quality of the mobility arrangements for students and teaching staff, including Erasmus student placements**

	Standard mobility	Placements
Scale 1 (1 to 25 persons)	260 €beneficiary	390 €beneficiary
Scale 2 (26 to 100 persons)	210 €beneficiary	315 €beneficiary
Scale 3 (101 to 400 persons)	150 €beneficiary	225 €beneficiary
Scale 4 (> 400 persons)	120 €beneficiary	180 €beneficiary

The National Agencies will determine the amounts of the scale of unit cost to be used in their country.

#### *3.2.2.2 Grants to institutions for Erasmus Intensive Language Courses (EILC) and Intensive Programs (IP)*

The grant is awarded as a flat-rate amount. The basis maximum amount is established for EILC at 6.000 euro and for IP at 7.000 euro, with the Cost of Living Index of 100. The maximum amount for the other countries is obtained by multiplying the basis maximum amount and the Eurostat cost of living index.

The National Agencies will determine the amounts of the flat-rate amount to be used in their country.

### 3.2.3 Comenius and Grundtvig programme

For Comenius and Grundtvig mobility, a contribution will be made to the real costs of language preparation. A contribution will be made to the real costs of course or seminar fees for Comenius and Grundtvig staff training and to the real costs of any training in CLIL (Content and Language Integrated Learning) funded for Comenius Assistants. Assistants' participation in induction courses may be funded with a flat-rate grant of 200€, or with a contribution to real costs if higher than this.

**Table 5d: Erasmus – Maximum Flat-rate amounts for Erasmus Intensive Language courses (EILC) and Intensive Programmes (IP)**

	<b>Cost of living index</b>	<b>EILC</b>	<b>IP</b>
Belgique/Belgie - BE	100,00	6000	7000
Bulgaria- BG	56,63	3398	3964
Ceska Republika - CZ	90,56	5434	6339
Danmark - DK	135,88	8153	9512
Deutschland - DE	100,20	6012	7014
Eesti - EE	80,26	4816	5618
Ellas - EL	93,00	5580	6510
Espana -ES	101,20	6072	7084
France - FR	119,00	7140	8330
Ireland - IE	122,40	7344	8568
Italia - IT	111,80	6708	7826
Kypros - CY	91,96	5518	6437
Latvija - LV	76,12	4567	5328
Lithuania - LT	77,07	4624	5395
Luxembourg - LU	100,00	6000	7000
Magyarország - HU	89,99	5399	6299
Malta - MT	89,55	5373	6269
Nederland - NL	109,70	6582	7679
Oesterreich - AT	107,10	6426	7497
Polska - PL	81,38	4883	5697
Portugal - PT	91,50	5490	6405
Rumania- RO	63,78	3827	4465
Slovenija -SI	82,97	4978	5808
Slovensko -SK	92,94	5576	6506
Suomi - FI	117,70	7062	8239
Sverige - SE	112,38	6743	7867
United Kingdom - UK	143,76	8626	10063
Island - IS	139,23	8354	9746
Liechtenstein - LI	125,12	7507	8758
Norge - NO	140,43	8426	9830
Turkey - TR	83,60	5016	5852

#### **4. STAFF COSTS – PROJECTS, NETWORKS, STUDIES AND COMPARATIVE RESEARCH, ACCOMPANYING MEASURES**

Erasmus, Leonardo da Vinci, Grundtvig, Comenius, Transversal Programme

##### **4.1 Staff costs**

Staff costs may be included for all sub-programmes and for all types of projects and networks. These actions are managed either by the National Agencies (Leonardo da Vinci Multilateral Projects supporting Transfer of Innovation) or by the Executive Agency.

The cost of staff assigned to the action, either by the beneficiary or by the co-beneficiaries, comprising actual salaries plus social security charges and other statutory costs included in the remuneration.

##### **4.2 Proposed amounts**

**Eligible staff costs** are calculated on the basis on the basis of scales of **eligible unit costs**. The table comprises **the maximum eligible daily rates**. The resulting amounts will be included in the requested budget and will be taken into account when calculating the Community contribution.

The rates in the table have been established taking into account:

- The Scales of unit Table used in the Leonardo da Vinci programme (Phase II) for estimation of the average real labour cost for five different categories of staff valid for 2003. This table has been established in 2005, based on Eurostat data from 2003, following a study by an independent expert. The amounts in this table are currently used to establish the eligibility of labour cost as proposed in the budget of projects by Applicants following the call for proposals.
- The table mentioned above has been updated to reflect average real labour cost for the multilateral projects to be launched in 2007. Because the projects will have a duration of maximum 3 years, an estimate of the average real labour cost for 2008 has been made in the following manner:
  - Application of the exchange rate Euro/national currency of December 2003 on the 2003 data to obtain values in national currencies.
  - The latest available data on from the Directorate General for Economic and Financial Affairs on the rise in labour cost for the years 2004-2007 ;
  - A projected rise in labour cost for 2008 of 2%;
  - Application of the exchange rate Euro/national currency of October 2006 to obtain projected values in Euro for 2008;
  - The categories of Researcher/Teacher and Trainer have been merged into a single category.

**Table 5e: Lifelong Learning Programme - Maximum eligible daily rates for Staff costs – Projects, Networks, Accompanying measures, Studies and Comparative Research**

<b>Country</b>	<b>Manager</b>	<b>Researcher Teacher Trainer</b>	<b>Technical</b>	<b>Admini- strative</b>
Belgique/Belgie - BE	364	311	252	196
Bulgaria- BG	34	31	24	16
Ceska Republika - CZ	100	100	73	52
Danmark - DK	468	401	326	254
Deutschland - DE	350	304	243	187
Eesti - EE	97	89	63	44
Ellas - EL	249	214	174	136
Espana -ES	278	250	192	134
France - FR	407	345	226	172
Ireland - IE	444	387	323	237
Italia - IT	538	314	213	176
Kypros - CY	287	252	156	107
Latvija - LV	93	76	61	41
Lithuania - LT	78	68	51	35
Luxembourg - LU	452	387	315	244
Magyarország - HU	123	107	81	46
Malta - MT	125	114	88	64
Nederland - NL	365	319	253	198
Oesterreich - AT	403	311	232	191
Polska - PL	148	122	95	68
Portugal - PT	174	154	112	76
Rumania- RO	115	89	69	43
Slovenija -SI	234	211	169	106
Slovensko -SK	78	69	56	46
Suomi - FI	349	249	206	173
Sverige - SE	495	424	348	268
United Kingdom - UK	445	419	295	212
Island - IS	387	353	304	195
Liechtenstein - LI	390	320	248	196
Norge - NO	502	435	356	268
Turkey - TR	158	100	66	43

For Jean Monnet projects the staff costs will have to be justified by the applicant. If these costs exceed the maximum rates indicated in (see the Jean Monnet pages of the EA web site), the surplus will be considered as ineligible

## 5. SUBSISTENCE COSTS - PROJECTS, NETWORKS, ACCOMPANYING MEASURES

Erasmus, Leonardo da Vinci, Grundtvig, Comenius, Transversal Programme

### 5.1 Subsistence costs

Subsistence costs may be included for all sub-programmes (except Jean Monnet) and for all types of projects and networks. These actions are managed either by the National Agencies (Multilateral Projects: Transfer of Innovation for the Leonardo da Vinci programme) or by the Executive Agency.

**Eligible subsistence costs** are calculated on the basis on the basis of scales of **eligible unit costs**. The table comprises **the maximum eligible daily rates**. The resulting amounts will be included in the requested budget and will be taken into account when calculating the Community contribution.

The rates in the table have been established taking into account:

- The daily rate for a country of index 100, which is determined in such a way that the beneficiary is supposed to bring in own sources of financing;
- The cost of living in the different countries as provided by Eurostat.

## 5.2 Proposed amounts

**Table 5f: Lifelong Learning Programme - Maximum eligible daily rates for Subsistence costs - Projects, Networks, Accompanying measures, Studies and Comparative Research**

	<b>Cost of living index</b>	<b>Daily rate</b>
Belgique/Belgie - BE	100,00	200
Bulgaria- BG	56,63	113
Ceska Republika - CZ	90,56	181
Danmark - DK	135,88	272
Deutschland - DE	100,20	200
Eesti - EE	80,26	160
Ellas - EL	93,00	187
Espana -ES	101,20	203
France - FR	119,00	239
Ireland - IE	122,40	245
Italia - IT	111,80	224
Kypros - CY	91,96	184
Latvija - LV	76,12	152
Lithuania - LT	77,07	155
Luxembourg - LU	100,00	200
Magyarország - HU	89,99	180
Malta - MT	89,55	179
Nederland - NL	109,70	220
Oesterreich - AT	107,10	215
Polska - PL	81,38	163
Portugal - PT	91,50	183
Rumania- RO	63,78	128
Slovenija -SI	82,97	165
Slovensko -SK	92,94	185
Suomi - FI	117,70	236
Sverige - SE	112,38	225
United Kingdom - UK	143,76	288
Island - IS	139,23	279
Liechtenstein - LI	125,12	251
Norge - NO	140,43	281
Turkey - TR	83,60	167

For Jean Monnet projects the subsistence costs will have to be justified by the applicant. If these costs exceed the maximum rates indicated in (see the Jean Monnet pages of the EA web site), the surplus will be considered as ineligible

## 6. PARTNERSHIP COSTS

### Grundtvig, Comenius

#### 6.1 Partnerships

Support to local activities and mobility activities for partnerships for Comenius and Grundtvig. These actions are managed by the National Agencies. The activities of the partnership consist of **local activities** in partner's own organisation (classroom activities, fieldwork, research etc) and **mobility activities** to its partners abroad (project meetings, head teacher study visits, staff exchanges etc.).

Partnerships are small-scale cooperation projects typically made up of institutions from at least 3 countries<sup>20</sup>. Comenius Partnerships consist of schools, Grundtvig Partnerships of adult education organisations. One institution per Partnership is the “coordinator”, the others are “partners”. The Partnership application is jointly prepared by all institutions, but each institution receives its own grant from its own National Agency. Each National Agency is therefore responsible for issuing and managing grant agreements with its own institutions.

Partnership grants will have standard 2-year duration. But in 2007, 1-year and 2-year renewal agreements will also be necessary in order to fund currently running Partnerships which, according to Socrates II, have a legitimate expectation of receiving a 2<sup>nd</sup> and/or 3<sup>rd</sup> and final year of funding for their activity as planned at original application stage. For this reason, each of the 5 categories of Partnership will exceptionally next year require both a 1-year and a 2-year variant, as shown below. No new participants are allowed to join existing Partnerships at renewal stage.

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<sup>20</sup> Approximately 10% of Comenius Partnerships include a class exchange and are bilateral.

## 6.2 Proposed amounts

Support to the costs of the partnership is given in the form of a flat-rate grant, that will cover all costs relative to the activities of the partnership i.e.: costs for **local activities** (publications, software, translations, language preparation etc), costs for **travel** and travel insurance and **subsistence** during mobility periods. However, the grant does not cover all staff effort involved in the management of the partnership.

**Table 5g: Comenius and Grundtvig - Maximum grant amounts for partnerships**

	<b>Minimum number of mobilities<sup>21</sup> per partner in a 2-year Partnership<sup>22</sup> (2007-2009):</b>	<b>Maximum flat rate grant per partner</b>	<b>Minimum number of mobilities<sup>23</sup> per partner in a 1-year renewal Partnership (2007 only):</b>	<b>Maximum flat rate grant per partner</b>
Comenius Partnership (small number of mobilities)	4	10.000 €	2	5.000 €
Comenius Partnership (1. Medium number of mobilities for multilateral Partnerships or 2. Small group class exchange for bilateral Partnerships)	12 <sup>24</sup>	20.000 €	6	10.000 €
Comenius Partnership (high number of mobilities – <b>only</b> for bilateral Partnerships which include a large group class exchange)	25 <sup>25</sup>	25.000 €	<i>Not applicable</i>	<i>Not applicable</i>
Grundtvig Partnership (small number of mobilities)	4	15.000 €	2	7.500 €
Grundtvig Partnership (medium number of mobilities)	12	25.000 €	6	12.500 €

To take account of the needs of staff or pupils/learners with special needs, or if mobility is planned to or from partners located in one of the territories listed in the Overseas Association Decision of the Council (see Annex VI), the minimum number of mobilities may be reduced by half.

The National Agencies will determine the flat-rate amounts to be used in their country.

<sup>21</sup> In the case of staff or pupils/learners with special needs or if mobility is planned from Overseas territories, the minimum number of mobilities may be reduced by half.

<sup>22</sup> These may be new Partnerships or renewals for 2 years.

<sup>23</sup> In the case of staff or pupils/learners with special needs or if mobility is planned from Overseas territories, the minimum number of mobilities may be reduced by half

<sup>24</sup> In the case of bilateral Partnerships, class exchange includes a group of minimum 10 pupils

<sup>25</sup> Class exchange includes a group of minimum 20 pupils

**ANNEX VI: LIST OF "OVERSEAS COUNTRIES AND TERRITORIES" DEFINED BY COUNCIL  
DECISION 2001/822/EC ANNEX VI**

- Greenland
- New Caledonia and Dependencies
- French Polynesia
- French Southern and Antarctic Territories
- Wallis and Futuna Islands
- Mayotte
- St Pierre and Miquelon
- Aruba
- Netherlands Antilles
- Bonaire
- Curaçao
- Saba
- Saint Eustatius
- Saint Martin (Sint Maarten)
- Anguilla
- Cayman Islands
- Falkland Islands
- South Georgia and the South Sandwich Islands
- Montserrat
- Pitcairn
- Saint Helena, Ascension Island, Tristan da Cunha
- British Antarctic Territory
- British Indian Ocean Territory
- Turks and Caicos Islands
- British Virgin Islands