The EU Lifelong Learning Programme

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A handbook for trade unions (2009)

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The EU lifelong learning programme: a handbook for trade unions

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Preface

Learning is central to the fast-changing society in which we all live. We need to ensure that people can acquire the appropriate knowledge, skills and qualifications they need to deal with the rapid changes taking place both in society and in the labour market. Access to lifelong learning contributes to personal development, whilst promoting not only economic development but also equal opportunities, citizenship and better social cohesion and integration in our increasingly multicultural societies. It forms a vital element in strengthening the European social model.

It is clear that promoting a high-quality lifelong education and training policy will not, on its own, solve all the serious problems of unemployment, social exclusion and poverty, or the underdevelopment that is evident in several regions. It needs to be accompanied by changes to the education and vocational training systems, by stronger cooperation between the different players, by more investment from both governments and employers, by new forms of management and by better information, consultation and participation opportunities for trade union organisations. Linked with these, lifelong learning has a crucial contribution to make towards achieving the European Union's objectives of full employment, a fairer distribution of income and a better work-life balance. That is why the European Trade Union Confederation (ETUC) has broadly supported the European Union's policy of creating a 'knowledge society', as set out in the Lisbon Strategy.

In the current global economic crisis, the drive to modernise and improve the quality of European education and training systems and to provide and promote genuine access for all to lifelong learning opportunities is critically important for Europe's economic recovery, its capacity to adapt to change and its ability to achieve greater social cohesion. Vocational education and training has a vital role to play in developing new skills for new jobs; at the same time, lifelong learning for all must provide opportunities to broaden individual social and cultural horizons. In calling for a real right and an equal access to lifelong learning for all, ETUC has set itself the goal of ensuring that:

> 'All workers on the labour market in Europe have the right and the opportunity to develop their aptitudes and skills in order to meet the needs for their work and also for their 'non-economic' aspirations'.

Within the framework of the Lisbon Strategy, the European Commission has restructured many of its previous education and training programmes into a new Lifelong Learning Programme which covers the period from 2007 to 2013. This programme offers exciting opportunities for new activities and experiences in education and vocational training, in which Europe's trade unions have an important role to play. This Handbook introduces the Programme, highlights the opportunities it offers to trade unions and explains how to take advantage of them.

We should like to thank Derek and Cherrie Stubbs from The Lyndhurst Partnership, who have written the Handbook, and Silvana Pennella and Sylviane Mathy from the European Trade Union Institute (ETUI), who have overseen its production.

We strongly encourage European trade unionists to make use of this Handbook and to involve themselves actively in the work of the new Lifelong Learning Programme.

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Introduction

This Handbook sets out to offer an introduction for trade unions to the European Union's new Lifelong Learning Programme. The Programme represents a major intervention in modernising European education and training systems, offering a wealth of opportunities for collaboration and cooperation in all fields of education and vocational training.

It embraces knowledge of all kinds - practical, theoretical, technical, vocational and academic - as the basis for social and cultural integration, as well as being at the heart of economic competitiveness. The Lifelong Learning Programme forms a key plank in the European Union's Lisbon Strategy to develop a new European economy, society and culture in the context of globalisation.

The Lifelong Learning Programme has a major emphasis on mobility. This includes exchanges between educational institutions, individual study visits, work placements and transnational seminars. It also supports transnational networks and projects that can develop innovative initiatives and widely disseminate the results of their actions.

The Lifelong Learning Programme is concerned not simply with education and training delivered in formal institutions, but with all forms of learning, including work-based learning, and with their recognition and accreditation.

The opportunities offered by the Lifelong Learning Programme depend on cooperation - not only between organisations based in different Member States but also between different kinds of organisations and actors: schools, colleges, universities, enterprises, local and regional authorities, libraries, community and voluntary sector organisations. Trade unions and other social partner organisations have a particularly important role to play, as the Lifelong Learning Programme explicitly recognises. The ETUC and the ETUI Education Department are both keen to encourage more trade unions to participate in and take full advantage of the new programme.

The Lifelong Learning Programme is a huge framework programme. It includes different kinds of actions, with different rules and regulations, and with a vast documentation which can appear daunting. This Handbook sets out to provide a tool to enable trade unions to understand how they can benefit from the opportunities which the programme offers. It provides an introduction to the Lifelong Learning Programme, a guide to navigating its structures and a consideration of its importance for trade unions, as well as practical assistance in preparing an application.

The Handbook falls into 5 main sections:

- Part 1 looks at the concept of lifelong learning and the background and context to the Lifelong Learning Programme.
- Part 2 looks at the programme itself: its structure, objectives and priorities.

- Part 3 looks at the importance of the Lifelong Learning Programme for trade unions and the opportunities that it offers them.
- Part 4 looks at the practicalities of planning a project, completing an application form and preparing a budget, as well as touching on the assessment process.
- The final section consists of various appendices, including a bibliography and a glossary.

The Handbook is intended as an information resource and a practical guide. We have tried to anticipate the fact that it will be read by people with different degrees of familiarity with EU policies and programmes and with different levels of experience of project work.

Although there is a clear progression through the chapters, it is not necessarily a book to be read from cover to cover in a linear fashion. How you can best use it will depend very much on your own knowledge and experience and what you need to know:

- If you are looking for some general information on the Lifelong Learning Programme, you might find it useful to start with Part 2 on the details of the programme itself and then go back to Part 1 to understand more of the policy context.

- If you want to understand what is involved in a European project, look at Chapter 7: Opportunities for trade unions and Chapter 8: Planning a Project.

- If you have been asked to become a partner in an Lifelong Learning Programme project, start with Part 2, but also look at Chapter 8: Planning a Project and maybe take a quick look at some of the other chapters in Part 4.

- If you are a trade union political officer, wondering about the significance of the Lifelong Learning Programme, look at Parts 2 and 3, then study Part 1.

- If you are planning to submit an application, then you are best advised to read everything. Part 1 will provide you with background on lifelong learning and recent developments in EU policy, before you move on to the detail of the Lifelong Learning Programme itself in Part 2. Part 3 may help you think more clearly about the potential for trade union involvement in the programme, but you will really need to focus carefully on Part 4 which offers detailed advice on preparing an application.

In writing the Handbook, we have tried to provide a user-friendly account of a highly complex initiative. We would welcome any feedback and suggestions for improvement, as well as additional examples or case studies of successful projects that might be incorporated in future editions.

The Lifelong Learning Programme opens up all kinds of possibilities for trade unionists to take part in the exciting new educational developments that are central to the idea of lifelong learning. We hope that this Handbook will encourage you to explore these opportunities.

Part 1

Chapter 1

What is 'lifelong learning'?

This chapter looks briefly at the development of the 'lifelong learning' concept and some of the key issues involved. It then goes on to examine the European Union's definition of the term, as well as trade union involvement in lifelong learning.

The idea of 'lifelong learning'

The term 'lifelong learning' is comparatively recent in origin and, as a concept, does not carry a clear and uncontested definition. It is used in association with a range of different ideas and inflections, not all of them immediately apparent in the term itself or necessarily easily reconciled.

At its most basic and most obvious, it embodies the notion that learning is something that occurs throughout life – a 'cradle to grave' process. This is by no means a new idea; one can find traces of similar thoughts in Plato. From the late nineteenth century onwards, however, there has been a recognition that the formal processes of initial education, normally ending in adolescence, were not in themselves sufficient. Out of this recognition have come various initiatives and traditions, including the French notion of **'éducation permanente'**, the Swedish concept of 'study circles', and the idea of the 'University of the Third Age'. In Britain, immediately following the First World War, the British Ministry of Reconstruction included an Adult Education Committee, which reported its view that

> 'adult education must not be regarded as a luxury for a few exceptional persons here and there, nor as a thing which concerns only a short span of early manhood, but that adult education is a permanent national necessity, an inseparable aspect of citizenship, and therefore should be both universal and lifelong'.[1]

The reality, however, has seldom matched the rhetoric and adult education has until recently been seen as a separate entity, less significant and less well resourced. A recent report from the European Association for the Education of Adults (EAEA)[2] suggests that the notion of 'lifelong learning' represents a fundamental shift, regarding school, vocational training, university and adult education as components of a comprehensive system that are of equal value. At the same time, however, we should also note that the levels of participation in the different elements of this 'comprehensive' system, and the resources available to them, still vary considerably.

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[1] Ministry of Reconstruction (1919) *Final Report of the Adult Education Committee,* London: HMSO.
[2] European Association for the Education of Adults (2006) *Adult Education Issues and Trends in Europe,* Brussels: EAEA. Available at http://www.eaea.org/doc/eaea/AETIstudyfinal.doc.

Traditionally, adult education has also been seen as non-vocational:

> '…adult education more accurately defined begins where vocational education leaves off. Its purpose is to put meaning into the whole of life'[3].

By contrast, 'lifelong learning' must include both the vocational and the non-vocational, although the question of emphasis is an interesting one. It is certainly the case that one of the strongest motors behind the adoption of the 'lifelong learning' banner has been the awareness of increasingly rapid technological change and the need to constantly update vocational skills.

Similar tensions can be seen between the different emphases applied to the second part of the term, which in some contexts is seen as representing a move away from the structured, directed, content-led implications of 'education' towards a more actively engaged process of 'learning'. Again, there is nothing new here. Eduard Lindeman, one of the most important theorists of adult education, writing in 1926, notes that:

> 'In conventional education the student is required to adjust himself to an established curriculum; in adult education the curriculum is built around the student's needs and interests'[4].

This shift is also seen as involving different pedagogic methodologies, different concepts of the role of teacher and also different methods of organising and delivering learning.

In an influential UNESCO report of 1972, Edgar Faure argued that:

> 'If all that has to be learned must be continually re-invented and renewed, then teaching becomes education and, more and more, learning. If learning involves all of one's life, in the sense of both time-span and diversity, and all of society, including its social and economic as well as its educational resources, then we must go even further than the necessary overhaul of 'educational systems' until we reach the stage of a learning society'[5].

By the 1990s, commentators were beginning to talk of a 'knowledge society' or an 'information society' and to see the citizens of this society as taking individual responsibility as consumers of wide-ranging learning opportunities. Personal development, economic prosperity and social cohesion were seen as central planks of this society, and 'lifelong learning' the key that would unlock human potential. By the beginning of the current decade, the term had acquired a significant currency, with most UK universities re-branding their Departments of Adult or Continuing Education as 'Centres for Lifelong Learning'.

At the same time, earlier concepts of 'open learning' and 'distance learning' were increasingly being replaced by 'e-learning'. However, this heavy reliance on what were often in fact highly-structured, instrumentalist online learning packages for individual self study, introduced another potential contradiction into the 'lifelong learning' concept.

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[3] Lindeman, Eduard C. (1926) *The Meaning of Adult Education*, New York: New Republic Inc.
[4] Lindeman, Eduard C. (1926)
[5] Faure, E. and others (1972) *Learning to Be*, Paris: UNESCO

The broadening of the definition of 'learning' is also linked to an acknowledgement of the wider spectrum of locations in which 'learning' takes place: no longer just formal education institutions, but also the workplace, the community and the home. In a similar vein, the 2006 EAEA report sees 'lifelong learning' as embracing many different kinds of learning opportunities, formal, informal and non-formal. Given the imperative to update skills continuously that we noted earlier, there has been a consequent desire to evaluate and to accredit all of this informal/non-formal 'learning' in some formal way. This has brought new challenges, including:

− The need to recognise and accredit learning that takes place away from the classroom, particularly informal and non-formal learning. Such recognition could both enhance the standing of these types of learning in their own right and recognise them as potential stepping stones in pathways towards more formal education and training.

− The need to value and support learning at work, often referred to as workplace or work-based learning. This raises many questions about, for instance, access to and financial support for learning opportunities, the nature of any curriculum, the role of educators and trainers and their relationship with employees and employers. It also raises issues about the role of the enterprise in providing such learning opportunities, as well as the appropriate modes of recognition and accreditation.

The term 'lifelong learning' is, then, not as simple and uncontroversial as it might at first appear: for some it represents a holistic vision of a new, more skilled and more inclusive society; for others it is at best just the latest vacuous educational 'buzz-word', and at worst a stalking horse for the increasing individualisation and privatisation of education. What is clear, though, is that it encompasses a series of challenges to traditional education and training policies and institutions.

At its boldest, however, the use of the term can be visionary, pointing to exciting opportunities that will bring far reaching benefits for citizens, states and institutions of learning. In this new world of lifelong learning:

− Education will no longer be seen as a preparation, associated with youth: rather, it will become an integral part of every stage of life.

− Traditional stages and structures will increasingly give way to more fluid accreditation, built on acquired competences and skills.

− Learning will no longer be restricted in time and place.

− Informal and non-formal learning will be given enhanced recognition and status.

− New social providers and new learning resources will be tapped: for instance, in areas such as intergenerational learning and teaching, as children learn from the elderly and vice versa.

− As well as new kinds of learners, there will be new kinds of 'teachers', taking account of new technologies and methodologies, and new networking opportunities.

– If successfully implemented, lifelong learning is seen as having the potential to create a culture in which learning of all kinds will carry a high intrinsic value and a society which will combine economic prosperity with high levels of rewarding employment and social integration.

The European Union and 'lifelong learning'

What, then, is the European Union's stance on 'lifelong learning' and how does this influence the Lifelong Learning Programme?

One of the earliest uses of the term in EU publications occurs in an influential 1995 White Paper, Teaching and Learning: Towards the Learning Society[6]. This calls for measures to create a new 'learning society', emphasising most particularly:

– The challenges posed by the 'information society', scientific and technological change and the internationalisation of the economy

– The importance of education and training to Europe in the context of technological and economic change

– The need for European society to build a broad knowledge base and competences for employment and economic life in order to combat these challenges.

In the context of its ambitions to become a knowledge society, it is understandable that the EU embraced the idea of lifelong learning as being central to its mission, announcing 1996 as 'The Year of Lifelong Learning'.

In 2001, the Commission produced a Memorandum on Lifelong Learning, which was followed by a major consultation process. The outcome was a Communication from the Commission in November 2001 - Making a European Area of Lifelong Learning a Reality[7]. This remains a key policy statement. In it, lifelong learning is defined as

> 'all learning activity undertaken throughout life with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective'.

Here we can see that the 1995 vision has become somewhat broader. The earlier emphasis on employment and the economy has been extended to include a concern with the personal, the social and the civic. Education and training are now seen as central not only to economic prosperity, but also to creating more satisfying and rewarding jobs and a more cohesive and inclusive society.

Stressing that people are at the centre of its concerns, Making a European Area of Lifelong Learning a Reality recognises that some groups are in danger of social exclusion and marginalisation, particularly those who leave school without acquiring the basic skills of literacy and numeracy, which are vital for economic and social participation. Lifelong learning

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[6] See http://ec.europa.eu/education/doc/official/keydoc/lb-en.pdf.
[7] See http://eur-lex.europa.eu/LexUriServ/site/en/com/2001/com2001_0678en01.pdf.

opportunities should make 'what is already on offer more visible, flexible, integrated and effective, while also developing new learning processes, products and environments'[8], targeting specific groups and ensuring equality of opportunity.

The Communication identifies the following objectives of lifelong learning:

– Active citizenship
– Personal fulfilment
– Social inclusion
– Employability and adaptability.

The Communication further articulates a number of 'building blocks' (together with a set of detailed priorities for each of them) as the basis for coherent and comprehensive strategies to be developed at both national and European levels. These are:

– Partnership working across the learning spectrum – building on diverse expertise and resources at all levels

– Understanding the needs for learning – grounded in local evidence

– Adequate resourcing for lifelong learning – raising the level of public and private investment

– Facilitating access to learning opportunities – removing social, geographical and psychological barriers and recognising the role of information, guidance and counselling in the process

– Creating a learning culture – making learning desirable by valuing and rewarding learning

– Striving for excellence – improving the learning experience.

The 2007-2013 Lifelong Learning Programme embodies the thinking in the Communication. It brings together various previous initiatives in the fields of education and vocational training under a single legislative framework. As ever, policy and legislation evolve in particular contexts in response to specific challenges. We shall look in more detail at the context of the Lifelong Learning Programme in the next chapter.

Trade unions and 'lifelong learning'

Before we leave the concept of 'lifelong learning', however, let us briefly explore the position of trade unions on these new developments.

There is a long tradition of trade union involvement in workers' education movements and in other branches of adult education. The kind of collective learning that Lindeman and others have championed is fundamental to trade union education: learning which is led by the learners' needs, and which values and builds on their experience. Trade unions are also deeply involved in the vocational aspects of lifelong learning and recognise the importance, both in personal and in economic terms, of improving workers' skills, qualifications and employability. They

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[8] Ibid.

are engaged, too, with the issues of validating competences gained in the workplace and in other informal or non-formal learning contexts.

At the same time, some of the changes signalled by a lifelong learning approach to education and training may well provide challenges for trade unions. They are likely to place new demands on teachers and trainers, as well as on employees. Different parts of Europe have radically different systems which may well prove difficult to harmonise. Negotiating the changes that the EU sees as necessary, whilst at the same time safeguarding workers' rights and responsibilities, may not always be easy.

In this process of change there will be a need to ensure that:

− Adequate access to the opportunities which lifelong learning offers is available to all. Current evidence indicates that it is normally those who already have a reasonable level of education who are able to benefit most from further education and training opportunities, leaving a majority of the lower-skilled and less-qualified increasingly disadvantaged. Trade unions have a major role to play in negotiating training opportunities with both employers and governments, as well as in encouraging and actively supporting learning among the workforce.

− Lifelong learning does not lead to a further reduction of state provision, a further commodification of education and training and an increasing privatisation which could exacerbate social and economic divisions.

− Adequate resources are available from both the public sector and employers to support the changes involved in the vision of lifelong learning and to ensure that the financial burden of lifelong learning does not fall disproportionately on individual learners.

What is encouraging is that the new Lifelong Learning Programme explicitly recognises the importance of trade unionists in developing these new approaches to education and training - as educators and trainers, and as workers and citizens who will benefit from enhanced learning opportunities. Perhaps their role is most obvious in the fields of vocational education and training, but trade unions are also being encouraged to participate as social partners in the development of policy across the spectrum. Workers' organisations – at all levels from local to European – are seen as being important actors and stakeholders in the evolution of this radical new approach.

There are interesting developments as trade unions respond to these challenges. In Britain, for example, the TUC has established Unionlearn to help unions open more learning opportunities to their members, particularly those disadvantaged in the labour market, and to promote collective action to increase learning in the workplace. Since 2002, over 20,000 Union Learning Representatives have been trained to encourage and support learning activities for employees and in 2007-8 more than 130 new Learning Agreements were signed with employers[9].

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[9] See http://www.unionlearn.org.uk/about/index.cfm and the 2008 Unionlearn Report: http://www.unionlearn.org.uk/files/publications/documents/131.pdf.

The challenge, then, is for trade unionists to nurture a continuing, constructive and productive dialogue in which civic and social values and needs are balanced with those of the economy, and in which the needs of individual workers are balanced with those of the enterprise. It is also to ensure that the costs of sustaining lifelong learning for adults are properly allocated and carried between the different parties – the state, employers, and individuals. This dialogue will take place in many forums, not least within the newly established Lifelong Learning Programme itself.

In the next chapter we look in more detail at some of the challenges facing the European Union and at some of the recent developments in education and training policy in response to them.

Chapter 2

New challenges for Europe: putting the Lifelong Learning Programme in context

It is important to understand the background to the Lifelong Learning Programme (LLP), particularly if you are intending to make an application for funding. In this chapter, we explore key aspects of the context within which the LLP has been developed and outline some of the major strands of EU policy which have framed its approach and objectives, as well as some of the recent European initiatives in this field.

You can find a more detailed consideration of some of these issues in Chapter 8 of Trade Unions and Transnational Projects: A guide to managing European training projects[10]. These issues, and some of the important statements of policy and legislation relating to them, are also referred to in the documentation of the LLP itself and, most particularly, in the preamble to the Decision establishing the Programme[11], which it is worth studying closely.

Fresh challenges

The European Union was first formed half a century ago, in the aftermath of the Second World War, by six democratic states determined to avoid such killing and destruction ever happening again. It now includes almost 500 million citizens from 27 Member States and is currently contemplating further enlargement to include Turkey and the West Balkan states. Today it faces new challenges, but also new opportunities, in a rapidly changing environment.

The revolutions in transport, technology and communication systems, together with the rise of new giant economies in the East, are transforming the global economy. The top 200 companies in the world now dominate the global marketplace, controlling over a quarter of the world's economic activity and more resources than many nation states. The world is becoming an increasingly small place, dominated by increasingly large enterprises.

This changing world poses new challenges for Europe. Among the more significant of these are:

– The globalisation of markets and enterprises

– Unemployment associated with economic change and restructuring

– The enlargement of the European Union

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[10] See
http://www.etui.org/education/resources/trade_unions_and_transnational_projects_sixth_edition__1.
[11] See http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_327/l_32720061124en00450068.pdf.

- Social exclusion and the marginalisation of certain groups within society

- Demographic changes, including an ageing population

- The growth of new technologies.

The European Union has been alert to these challenges and, over a long period, has been developing economic policies to address them – policies focused on consolidation and harmonisation, monetary union, and the free movement of goods and labour, for example. But it has also been concerned to develop a 'Social Europe', with a common set of objectives and social policies, designed to combat social exclusion and discrimination.

To these challenges has now been added that of a new global economic crisis, unprecedented in its scale and complexity. Developing new skills in the European workforce and matching them to new jobs will be crucial for the European Union's economic and social well-being.

The Lisbon Strategy

The meeting of the European Council in Lisbon in March 2000, which adopted what has come to be known as the 'Lisbon Strategy'[12], marked a key moment in the process of policy formulation in response to these challenges. The Lisbon Strategy set the European Union a new strategic goal for the next decade:

> 'To become the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion. Achieving this goal requires an overall strategy aimed at:

- preparing the transition to a knowledge-based economy and society by better policies for the information society and R&D, as well as by stepping up the process of structural reform for competitiveness and innovation and by completing the internal market;

- modernising the European social model, investing in people and combating social exclusion;

- sustaining the healthy economic outlook and favourable growth prospects by applying an appropriate macro-economic policy mix.'

The Lisbon Strategy rests on three principles or pillars:

- An economic pillar supporting the transition to a competitive dynamic knowledge-based economy

- A social pillar designed to modernise the European social model by investing in human resources and combating social exclusion

- An environmental pillar asserting that economic growth must not rest on the depletion of natural resources.

Education and training are seen as central to the achievement of these aims. They are viewed as the foundations not simply of a more

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[12] For the full text of the Lisbon Strategy, see http://www.europarl.europa.eu/summits/lis1_en.htm. Although it is acknowledged that the objectives of the Lisbon Strategy are now unlikely to be achieved by 2010, its goals remain the key drivers of EU economic and social policy.

sustainable and competitive economy, but also of higher levels of more challenging and satisfying employment for a more highly skilled and adaptable workforce. In achieving this, they are also seen as providing greater levels of social cohesion.

The Education and Training 2010 Work Programme

In the previous chapter we discussed the European Commission's Communication, Making a European Area of Lifelong Learning a Reality. In the light of that policy statement and two years after the Lisbon summit, the European Council adopted a Detailed work programme on the follow-up of the objectives of education and training systems in Europe (now referred to as the Education and Training 2010 work programme) at its meeting in Barcelona in March 2002[13]. This sets out the following 'ambitious but realistic goals' to be achieved by 2010:

– 'The highest quality will be achieved in education and training and Europe will be recognised as a world-wide reference for the quality and relevance of its education and institutions;

– Education and training systems in Europe will be compatible enough to allow citizens to move between them and take advantage of their diversity;

– Holders of qualifications, knowledge and skills acquired anywhere in the EU will be able to get them effectively validated throughout the Union for the purpose of career and further learning;

– Europeans, at all ages, will have access to lifelong learning;

– Europe will be open to cooperation for mutual benefits with all other regions and should be the most-favoured destination of students, scholars and researchers from other world regions.'

The work programme goes on to define three strategic objectives to help achieve these goals, broken down into thirteen associated objectives:

Strategic objective 1: To improve the quality and effectiveness of education and training systems in the EU

– To improve the education and training of teachers and trainers
– To develop skills for the knowledge society
– To ensure access to ICT for everyone
– To increase recruitment to scientific and technical studies
– To make the best use of resources.

Strategic objective 2: To facilitate the access of all to education and training systems

– To create an open learning environment
– To make learning more attractive
– To support active citizenship, equal opportunities and social cohesion.

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[13] See http://eur-lex.europa.eu/LexUriServ/site/en/oj/2002/c_142/c_14220020614en00010022.pdf.

Strategic objective 3: To open up education and training systems to the wider world

- To strengthen the links with working life, research and society at large
- To develop the spirit of enterprise
- To improve foreign language learning
- To increase mobility and exchange
- To strengthen European cooperation.

Each of these is accompanied by a series of more precisely defined sub-objectives, with specific performance indicators and a timetable for their achievement.

The broad range of challenges at every level of education and training that the work programme set out to tackle includes the following:

- Increasing the number of people who are actively involved in learning at post-secondary school level. This involves not merely making continuing education and training more attractive and more readily available, but also providing better information, counselling and guidance and generally fostering a learning culture. There is an increasing awareness of the important role of the social partners in this process.

- Valuing and validating learning gained in non-formal education and training[14]. This includes, of course, the validation of skills gained in the workplace, which is an issue of huge importance for workers and trade unions.

- Encouraging innovation. If these goals are to be achieved there, is a need for education and training systems to explore new structures and new pedagogic methods and resources. There is also a need for close cooperation at European level, not simply to collaborate on innovative approaches, but then to transfer that innovation to other organisations, sectors and countries.

- Exploiting information and communication technologies. The work programme has a specific focus on ensuring access to IT for everyone. This includes both access to ICT and Internet resources and the development of skills in using IT. This is also closely related to the exploitation of ICT to explore new methods and resources for teaching and learning, commonly referred to as e-learning.

- Increasing mobility and exchange. In the new knowledge society envisaged in the Lisbon Strategy, citizens are encouraged to be increasingly mobile, whether for jobs, study, leisure or retirement – indeed, 2006 was designated as the Year of Mobility[15] – although the reality may lag behind the aspiration[16]. Workers are intended not only to be highly skilled, but also to be highly mobile, able to enjoy the

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[14] For more information, see http://ec.europa.eu/education/lifelong-learning-policy/doc52_en.htm.
[15] See
http://europa.eu/legislation_summaries/internal_market/living_and_working_in_the_internal_market/free_movement_of_workers/c11333_en.htm.
[16] A recent study, for example, estimated that only 1.5% of EU citizens actually live and work in a Member State different from their country of origin, although this figure may well be rising as people from the new Member States seek higher standards of living in Western Europe. See ETUC publication *Mobility on the labour market and lifelong learning*, downloadable from http://www.etuc.org/a/3707.

freedom of movement that the Union guarantees. Transferable and generic skills are crucial to this mobility. However, there are critical barriers to increased mobility, which the work programme highlights:

– Language is a major barrier to mobility and closer social integration in Europe. Competence in at least two foreign languages is a European goal, with familiarisation beginning in the early stages of education.

– Common systems of qualifications are another major barrier. Education and training systems differ significantly and skills, competences and qualifications gained in one context are often not recognised in another.

In May 2003, the Council agreed a series of five benchmarks to be applied in monitoring progress in the field of education and training towards the Lisbon goals in the period to 2010:

– The EU average rate of early school leavers (the share of the population aged 18-24 with only lower secondary education or less and not in education or training) should be no more than 10%.

– The total number of graduates in mathematics, science and technology in the EU should increase by at least 15% while at the same time the gender imbalance within this group should decrease.

– At least 85% of 22 year-olds in the EU should have completed upper secondary education.

– The percentage of low-achieving 15 year-olds in reading literacy in the EU should have decreased by at least 20% in comparison with the level in 2000.

– The EU average level of participation in Lifelong Learning should be at least 12.5% of the 25-64 age group.

Progress towards these five benchmarks, together with other indicators relating to the work programme objectives, forms the subject of bi-annual reports produced by the Commission, drawing together data from a series of national reports[17]. More information about the latest position and the new strategic framework 'Education and Training 2020' can be found later in this chapter.

In 2009 the Commission launched the **KSLLL (Knowledge System for Lifelong Learning)** website[18] which provides up-to-date information on the Education and Training 2010 work programme, as well as compendia of good practice and country-specific information. The KSLLL website will support the priority areas and working methods to be developed within the new strategic framework 'Education and Training 2020'.

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[17] See http://ec.europa.eu/education/policies/2010/nationalreport_en.html.
[18] See http://www.kslll.net .

The European Union's role in education and training

It is important to understand that, notwithstanding its various statements on education and training policy, the European Union has only limited powers in this field. It can operate here only on the principle of **subsidiarity**, as set out in Articles 149 and 150 of the Maastricht Treaty.

This means that the Union can only initiate actions which the individual Member States would be incapable of undertaking themselves. This effectively means actions conducted at a transnational level and involving or affecting more than one Member State. On this basis, the Union is able, for example, to provide the opportunity for transnational learning and teaching projects and to encourage academic and professional networks. It has, though, no power to define or impose a common education policy on Member States.

Instead, it seeks to promote cooperation between Member States and encourages a European dimension in education and training, aiming to preserve the best of the diversity in systems and methodologies, whilst seeking to improve standards overall. It provides a forum for discussion on education and training and, through the **open method of coordination** developed as part of the Lisbon Strategy, has developed a framework to encourage convergence of national policies and collaborative identification of objectives, yardsticks and standards against which Member States can measure their progress towards improvement.

Towards common European frameworks

Within this context of transnational cooperation, the European Union has fostered a range of concrete initiatives over the last decade, aimed at harmonising and improving European education and training systems. These include:

The Bologna Process: Higher Education

The 'Bologna Process' aims to create a European Higher Education Area by 2010, in which students can choose to move between a wide and transparent range of high quality courses throughout Europe and can benefit from easy recognition procedures of their previous achievements[19]. The 1999 Bologna Declaration sets out the requirements for this:

− A system of easily readable and comparable degrees (National Qualifications Framework)

− A common recognition of two cycles of higher education: an initial cycle of at least three years, and a second higher degree cycle. (This has since been re-designated as a three-cycle system – Bachelors/Masters/Doctorate.)

− European cooperation in transparent and high-level quality assurance

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[19] For more detailed information on the Bologna Process, see
http://ec.europa.eu/education/policies/educ/bologna/bologna_en.html.

- A system of transferable credits, such as the European Credit Transfer System, to enable widespread student mobility

- Promotion of mobility (i.e. working and studying abroad) for both students and staff in universities.

The Copenhagen Process: Vocational Education and Training

Vocational education and training (VET) is undergoing a similar process of harmonisation and modernisation. In November 2002, the Education Ministers of 31 European countries (EU Member States, candidate countries and EEA-EFTA countries) met with the Commission and the European social partner organisations to adopt The Copenhagen Declaration[20]. This committed the signatories to work together to improve coordination between national systems of VET, with a view to developing:

- A single framework for transparency of competences and qualifications

- A system of credit transfer for VET, similar to the European Credit Transfer System operating in Higher Education

- Common criteria and principles for quality in VET

- Common principles for the validation of non-formal and informal learning

- Improved guidance and counselling systems with a European dimension.

  The work which has followed – referred to as the 'Copenhagen Process' – has been developed within a perspective of lifelong learning, with an emphasis on progressively building on learning acquired at different stages of life, in both formal and non-formal contexts.

  Since the 2002 meeting, the partners in the Copenhagen process, with the addition of Croatia, have met three times to review progress towards the original goals. Their findings have been published in the 2004 Maastricht Communiqué[21], the 2006 Helsinki Communiqué[22] and the 2008 Bordeaux Communiqué[23]. The most recent of these recommends that work needs to be focused in the following priority areas:

- Implementing the tools and schemes for promoting cooperation in the field of VET at national and European level, in particular, EQF, ECVET and EQARF (see below)

- Highlighting the quality and attractiveness of VET systems

- Improving links between VET and the labour market

- Strengthening European cooperation arrangements.

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[20] See http://ec.europa.eu/education/vocational-education/doc1143_en.htm.
[21] See http://ec.europa.eu/education/news/ip/docs/maastricht_com_en.pdf.
[22] See http://ec.europa.eu/education/policies/2010/doc/helsinkicom_en.pdf.
[23] See http://ec.europa.eu/education/lifelong-learning-policy/doc/vocational/bordeaux_en.pdf.

Europass

Europass provides a single European framework for the transparency and recognition of both formal and non-formal learning. It comprises five elements:

- Europass-CV: this is a new common European format curriculum vitae, designed to allow people to illustrate their skills and competences, whether gained in formal or non-formal contexts.

- Europass - Mobility: using a common European format, this records all periods of transnational mobility for learning purposes at whatever level.

- Europass - Diploma Supplement: this is a supplementary document to a degree or diploma describing in a common European format the nature, level, context, content and status of any higher education courses completed.

- Europass – Certificate Supplement: this fulfils a similar function to the Diploma Supplement and relates to any vocational qualifications held.

- Europass – Language Portfolio: this enables users to present their linguistic abilities in accordance with a set of common European standards, as well as attaching a file of personal work to illustrate the level reached.

Europass was approved by the European Council in December 2004 and is supported by a web portal, allowing users to complete for themselves the CV and Language Portfolio. It is also supported by a network of National Europass Centres[24].

The European Qualifications Framework (EQF)

The EQF relates different countries' national qualifications systems to a common European reference framework, so that individuals and employers are better able to understand and compare the qualifications levels of different countries and different education and training systems. A product of the Education and Training 2010 work programme, it sets out to establish a common European framework to describe what a learner knows, understands and is able to do, regardless of the system under which a particular qualification was acquired. As an instrument for the promotion of lifelong learning, the EQF encompasses general and adult education, vocational education and training, and higher education.

The EQF comprises eight separate reference levels, which are based on 'learning outcomes' (i.e. what the learner can do), thus shifting the focus away from the traditional approach, which emphasises learning inputs (length of a learning experience, type of institution). The eight levels cover the entire span of qualifications, from those achieved at the end of compulsory education to those awarded at the highest level

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[24] For more information, see http://europass.cedefop.europa.eu/europass/preview.action.

of academic and professional or vocational education and training. The EQF was adopted by the European Parliament and Council in April 2008. The resolution encourages all Member States to relate their qualifications systems or frameworks to the EQF by 2010 and to ensure that all new qualifications issued from 2012 carry a reference to the appropriate EQF level[25].

The European Credit System for Vocational Education and Training (ECVET)

The ECVET aims to create a European system to facilitate the transfer, validation and recognition of learning outcomes acquired by individuals moving from one learning context to another or from one qualification system to another. The development of the ECVET began in 2002 as a product of the Copenhagen Process. In April 2008 the Commission released the final version of the scheme which is now being considered by national governments and the European Parliament as part of the process of final approval. The Lifelong Learning Programme has supported several projects that have experimented with and promoted the ECVET in different sectors[26].

The European Common Quality Assurance Reference Framework for Vocational Education and Training (EQARF)

The EQARF is intended to serve as a reference instrument to help Member States to promote and monitor continuous improvement of their VET systems, based on common European references. It is based on a four point quality cycle which seeks to promote a culture of quality improvement at all levels, while respecting the rich diversity of national education systems. The EQARF is currently the subject of a recommendation from the European Parliament and the Council to Member States with the proposal that within 2 years from the adoption of the recommendation they devise an approach aimed at improving quality assurance systems at national level and making best use of EQARF, involving the social partners, regional and local authorities and all other relevant stakeholders[27].

The European Network on Quality Assurance (ENQA-VET)

The Network was established in October 2005 and is a voluntary forum in which the stakeholders at different levels in the field of VET can exchange experiences and views and build consensus. One of its objectives is to promote the use of the Common Quality Assurance Framework (CQAF). Currently, the Network comprises 23 Member

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[25] For more information, see http://ec.europa.eu/education/lifelong-learning-policy/doc44_en.htm and http://ec.europa.eu/dgs/education_culture/publ/pdf/eqf/broch_en.pdf.
[26] For more information, see http://ec.europa.eu/education/lifelong-learning-policy/doc50_en.htm.
[27] See http://ec.europa.eu/education/lifelong-learning-policy/doc1134_en.htm.

States, EFTA-EEA Countries, and Candidate Countries, together with representatives of the European social partners[28].

Key Competences for Lifelong Learning — A European Reference Framework

In December 2006 the European Council and the Parliament adopted a Recommendation on Key Competences for Lifelong Learning[29] which is intended as a European reference framework. It defines eight key competences that provide the basis for lifelong learning:

– Communication in the learner's mother tongue

– Communication in foreign languages

– Mathematical competence and basic competences in science and technology

– Digital competence

– Learning to learn

– Social and civic competences

– Sense of initiative and entrepreneurship

– Cultural awareness and expression.

Recent developments

In December 2008 the Commission published two closely related Communications. The first proposed a new framework for cooperation in education and training; the second focused on matching labour market and skills needs.

An updated strategic framework for European cooperation in education and training

The Communication, An updated framework for European cooperation in education and training[30], effectively represents a review of the Education and Training 2010 work programme as it nears its end and a proposal to update and extend this.

Whilst it recognises that there has been progress on some fronts, most notably on the modernisation of higher education and the development of European instruments promoting quality, transparency of qualification and mobility, it is concerned that progress varies considerably in different countries and is still insufficient in many key areas. It acknowledges that of the five benchmarks for 2010 only one, for maths, science and technology graduates, has yet been met and the rest are unlikely to be achieved. Performance on low achievers in literacy has even deteriorated.

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[28] See http://www.enqavet.eu/index.html.
[29] See http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_394/l_39420061230en00100018.pdf and http://ec.europa.eu/dgs/education_culture/publ/pdf/ll-learning/keycomp_en.pdf .
[30] See http://ec.europa.eu/education/lifelong-learning-policy/doc/com865_en.pdf.

In these circumstances, it is essential that implementation needs to be strengthened.

− The document proposes that European cooperation in education and training should address four themes in the years to 2020:

  − Making lifelong learning and learner mobility a reality

  − Improving the quality and efficiency of provision and outcomes

  − Promoting equity, social cohesion and active citizenship

  − Enhancing innovation and creativity, including entrepreneurship, at all levels of education and training.

It then goes on to set out a number of priority themes to be highlighted during 2009-10 and to propose a series of updated benchmarks against which to measure progress towards the new objectives.

This initiative was taken further by the meeting of the Council in May 2009 which in its General Conclusions on a strategic framework for European cooperation in education and training ("ET2020")[31] broadly endorsed the Commission's proposals, extending the Education and Training work programme to 2020 and agreeing the following revised benchmarks to be achieved by that date:

− An average of at least 15% of adults should participate in lifelong learning

− The share of low-achieving 15 year-olds in reading, mathematics and science should be less than 15%

− The share of 30-34 year-olds with tertiary educational attainment (i.e. having successfully completed tertiary level education) should be at least 40%

− The share of early leavers from education and training (the share of the population aged 18-24 with only lower secondary education or less and not in education or training) should be less than 10%

− At least 95% of children between 4 years old and the age for starting compulsory primary education should participate in early childhood education.

In addition, the Commission is invited to consider the possibility of developing three further benchmarks:

− On learning mobility, initially for higher education, but with the possibility of extending this to include vocational education and training and teacher mobility

− On enhancing employability through education and training

− On learning at least two foreign languages from an early age.

The document clarifies that the benchmarks are not to be seen as targets for each individual country to achieve but collective European goals to which Member States will contribute according to their ability and circumstances.

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[31] See http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/educ/107622.pdf.

New skills for new jobs

The Communication, New Skills for New Jobs: Anticipating and matching labour market and skills needs[32], acknowledges the critical importance of skills upgrading both for Europe's recovery from the current economic crisis and for its longer term growth and productivity, for its jobs and its capacity to adapt to change, as well as for its equity, gender equality and social cohesion. At the same time, it suggests that ensuring a better match between the supply of skills and labour market demand is just as necessary.

The Communication presents a first assessment of future skills requirements up to 2020, looking at long-term trends in job creation and labour supply and at trends in skills needs and occupations. It then goes on to suggest ways of improving capacities, including:

- The establishment of a European Labour Market Monitor with up-to-date information on short-term trends in the European labour market.

- A multilingual dictionary of occupations and skills to help improve matching of job seekers to vacancies.

- Match and Map, an online service for citizens, providing information on occupations, skills, learning and training opportunities across the EU. It will also provide geographic mapping of EU job offers matching a user's profile and skills.

The role of the Lifelong Learning Programme

The LLP is one of the major funding mechanisms through which the European Union is seeking to achieve the objectives of the Lisbon Strategy in the field of education and training. Recognising that people are the key to Europe's economic and social future, the Commission has been frank about the need to go beyond traditional education and training policies, seeing them as ill equipped to enable future European citizens to meet new challenges posed by globalisation, demographic change, digital technology and environmental damage. The LLP's central focus is on cooperation and exchange in modernising Europe's education and training systems and on developing not only a skilled, trained and adaptable workforce, but also a European Union that is more prosperous, inclusive, tolerant and democratic.

It is important to realise, though, that the LLP is not the only funding programme that addresses these issues. Other important instruments include:

- **The European Social Fund** which supports actions concerned with employment-related aspects of education and training, with promoting social integration and equal opportunities, and with combating discrimination[33].

- **The Youth in Action Programme** which makes an important contribution to the acquisition of competences and is a key instrument

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[32] See http://ec.europa.eu/education/lifelong-learning-policy/doc/com868_en.pdf.
[33] See http://ec.europa.eu/employment_social/esf/index_en.htm.

in providing young people with opportunities for non-formal and informal learning with a European dimension[34].

– **The Community Action Programme for Employment and Solidarity (PROGRESS)** which supports the objectives of the Social Agenda, including full employment, social protection and social inclusion, the improvement of working conditions, antidiscrimination and gender equality[35].

These are seen as complementary programmes, each with its own particular inflection but working towards the common goal of implementing the Lisbon Strategy. They are framed principally within policies designed to deliver different aspects of the Strategy, including the European Employment Strategy[36] and the Social Agenda[37]. As well as familiarising yourself with some of the key documents on education and training, it is helpful to have a basic understanding of some of these other areas of EU policy, particularly if you are framing a proposal related to VET. You will find additional references to useful background documentation in the Bibliography.

The LLP remains the EU's flagship enterprise in the field of education and training. It brings together within a single framework of 'lifelong learning' what were previously a range of disparate initiatives. In doing so, it aims to provide greater synergy and focus, closer cooperation between different levels of education and training and a simpler, more streamlined and efficient administration. It represents an exciting and ambitious attempt to modernise the skills of the workforce and citizens of Europe by supporting mobility and the modernisation of education and training throughout Europe.

In this chapter, we have looked at the background to the development of the LLP, setting it within the context of a changing Europe and some of the key policy statements on education and training as well as highlighting some of the common frameworks that are being produced.

In the next chapter we provide a brief overview of the aims and structure of the LLP and the kinds of actions it supports in helping to realise the Lisbon Strategy.

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[34] See http://ec.europa.eu/youth/youth-in-action-programme/doc74_en.htm.
[35] See http://ec.europa.eu/social/main.jsp?catId=327&langId=en.
[36] See http://ec.europa.eu/social/main.jsp?catId=101&langId=en.
[37] A Renewed Social Agenda was adopted by the Commission in July 2008. For information, see http://ec.europa.eu/social/main.jsp?langId=en&catId=547.

Part 2

Chapter 3

The Lifelong Learning Programme in a nutshell

In this chapter we provide a short overview of the key features of the Lifelong Learning Programme, together with some brief information on the actions supported under the 2009 Call for Proposals. We will look in more detail at some of these, particularly those most likely to be of interest to trade unions, in a later chapter.

The Lifelong Learning Programme (LLP) is an integrated action programme for co-operation and mobility in education and vocational training, organised by the European Commission's Directorate-General for Education and Culture. With an overall budget of more than 7 million Euros, it represents a significant intervention in European education and training. The details of the LLP are set out in the Decision of the European Parliament and of the Council of 15 November 2006, establishing the Programme[38].

The LLP runs from 2007 to 2013 and brings together what were several previous programmes, including the Comenius, Erasmus, Leonardo da Vinci, Grundtvig and Jean Monnet Programmes, within a single framework programme. It also replaces some of the EU's previous actions in the fields of language learning and support for e-learning.

General objective

The general objective of the LLP is:

> 'to contribute through lifelong learning to the development of the Community as an advanced knowledge-based society, with sustainable economic development, more and better jobs and greater social cohesion, while ensuring good protection of the environment for future generations. In particular, it aims to foster interchange, cooperation and mobility between education and training systems within the Community so that they become a world quality reference'.

The LLP has a number of specific and operational objectives which break down this broad statement into more detailed and concrete goals. We will look at these in the next two chapters.

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[38] See http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_327/l_32720061124en00450068.pdf.

Structure

Sectoral sub-programmes

The Lifelong Learning Programme consists of four sectoral sub-programmes, addressing different stages of the lifelong learning cycle:

− **Comenius**

The Comenius Programme addresses the teaching and learning needs of all those in **pre-school and school education**, up to the level of the end of upper secondary education, and the needs of the institutions and organisations providing such education. Not less than 13% of the total LLP budget will be devoted to the Comenius Programme.

− **Erasmus**

The Erasmus Programme addresses the teaching and learning needs of all those in formal **higher education and in vocational education and training at tertiary level**, whatever the length of their course may be, up to and including doctoral studies, and the needs of the institutions and organisations providing or facilitating such education and training. The Erasmus Programme will account for not less than 40% of the total LLP resources.

− **Leonardo da Vinci**

The Leonardo da Vinci Programme addresses the teaching and learning needs of all those in **vocational education and training, other than at tertiary level**, as well as the needs of the institutions and organisations providing or facilitating such education and training. It is envisaged that not less than 25% of the total LLP resources will be devoted to the Leonardo da Vinci Programme.

− **Grundtvig**

The Grundtvig Programme addresses the teaching and learning needs of those in all forms of **adult education**, as well as the needs of institutions and organisations providing or facilitating such education. In the LLP, 'adult education' is seen as addressing persons over 25 years of age or younger persons who are no longer participating in initial education. Not less than 4% of the total LLP resources will be allocated to the Grundtvig Programme.

In addition to the four sectoral sub-programmes, the LLP also includes a Transversal Programme and the Jean Monnet Programme.

The Transversal Programme

The Transversal Programme is designed to promote cooperation in fields which cover two or more of the sectoral sub-programmes and is organised into four Key Activities:

− Policy cooperation and innovation in lifelong learning;

− Promotion of language learning;

− Development of innovative ICT-based content, services, pedagogies and practice for lifelong learning;

− Dissemination and exploitation of results of actions supported under the programme and previous related programmes, and the exchange of good practice.

The Jean Monnet Programme

The final element of the LLP is the continuation of the Jean Monnet Programme, which concentrates on support for students, teachers and researchers who are studying European integration. It supports initiatives such as the establishment of professorial chairs in higher education, support for young researchers and the development of European awareness within the university curriculum. It also awards operating grants to a number of specialised European institutions.

What kind of actions does the LLP support?

Within its various programmes, the LLP supports and funds a range of different types of action. These include:

Mobility

Mobility, defined as 'spending a period of time in another participating country, in order to undertake study, work experience, other learning or teaching activity or related administrative activity', is a major feature of the LLP[39]. Depending on the sub-programme, these activities may take a variety of forms, from visits for school students to work placements or in-service training abroad. They also include the possibility of Preparatory Visits to make contact and draw up work plans for future LLP **Partnerships** (see below). A major part of the sectoral sub-programme budgets is allocated for mobility and associated transnational partnership activities:

− Comenius, not less than 80%

− Erasmus, not less than 80%

− Leonardo, not less than 60%

− Grundtvig, not less than 55%.

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[39] Art. 2.15 of the Decision establishing an action programme in the field of lifelong learning. See http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_327/l_32720061124en00450068.pdf.

Partnerships

Partnerships take the form of either a bilateral or a multilateral agreement between a group of institutions or organisations in different participating countries to carry out joint European activities in lifelong learning on a theme or topic of common interest. They will combine **local activities** (classroom activities, fieldwork, research) with **mobility activities** to meet and work with partners abroad. Partnerships are seen as involving relatively small-scale activities, as distinct from **Networks** (see below), and as being less immediately 'outcome-oriented' than cooperation **Projects**.

Multilateral Projects

LLP Multilateral Projects normally involve at least 3 institutions or organisations from different participating countries who come together to pool their knowledge and experience in a common effort to produce **innovative products and results** that have potential for application at a European level. In a limited number of cases, and most particularly within the Jean Monnet Programme, there are also possibilities in some programmes for Unilateral or National Projects.

Unilateral or National Projects

An activity with a defined and exploitable outcome, developed in a single institution or in only one country.

Networks

The characteristics of an LLP Network will differ slightly according to the specific programme or sub-programme, but in general terms it will be a larger-scale grouping of institutions and organisations. It is likely to be multi-player: it will bring together actors with different kinds of interest or involvement (e.g. academics, teachers, local authorities, social partners) to address a common European theme or issue within the priorities of the LLP. It will have a long-term commitment with a specific work programme, focusing on **strategic reflections, surveys and/or needs analyses** and normally including a major responsibility to disseminate its results.

Observation and analysis

The Transversal Programme also supports multilateral teams of academics and researchers undertaking **Studies and Comparative Research** activities on specific topics.

Accompanying measures

These are activities which provide general support in promoting the objectives of the various programmes and sub-programmes. They include principally raising awareness of the LLP and disseminating information about the activities and results of various programmes and sub-programmes. They also include activities within the sectoral sub-programmes which address the EU's **horizontal policies**, including

most particularly the promotion of equality between women and men, the integration of disabled people and others with special educational needs, and the promotion of intercultural education and the fight against racism. The Comenius sub-programme also has a specific accompanying measure, **eTwinning**, which provides a framework for schools to collaborate on the Internet with partner schools in other European countries.

Sectoral Programmes

Not all of the programmes include all of the above actions. The table below indicates which main actions are supported by which of the sectoral programmes.

Activity	Comenius	Erasmus	Leonardo	Grundtvig
Mobility	Pupil exchanges Placements In-service training courses Assistantships Preparatory visits	Foreign study periods for students Staff training Student work placements Teaching assignments Intensive programmes Language courses Preparatory visits	Transnational placements in enterprises or training establishments Placements and exchanges for VET professionals Preparatory visits	Individual adult learner visits Workshops Assistantships In-service training for staff Visits & exchanges for staff Senior Volunteering Projects Preparatory visits
Partnerships	Partnerships between schools REGIO partnerships to foster inter-regional cooperation between organisations responsible for school education		Learning partnerships in areas of mutual interest	Learning partnerships in areas of mutual interest
Multilateral projects	Curriculum and materials development Promoting best practice Developing new teacher training courses/content	Curriculum development University/enterprise cooperation Modernisation of higher education Virtual campuses	Development of innovation Transfer of innovation	Education content and delivery Improving systems and policies Improving access Improving management
Multilateral networks	Subject-related innovation and good practice Content support to other networks Analyses and case studies	Subject-related consortia in a particular discipline ('Academic networks') Structural or management issues ('Structural networks')	Thematic networks focussing on vocational education and training Identifying trends and skills requirements	Subject related or management Good practice and innovation Content support Needs analysis and quality assurance
Accompanying measures	Promoting Comenius objectives. eTwinning	Promoting Erasmus objectives	Promoting Leonardo objectives	Promoting Grundtvig objectives

Transversal Programme

The above actions all relate to one of the specific sectoral sub-programmes. The Transversal Programme, however, must involve partners from more than one sector: for example, an e-learning project, involving both secondary schools and adult education organisations, or a network promoting language learning in all areas of education. The following grid shows the types of actions supported in the various strands of the Transversal Programme:

Activity	Policy Cooperation & Innovation	Languages	ICT	Dissemination & Exploitation of Results
Mobility	Study visits			
Unilateral & national projects				Unilateral & national projects
Multilateral projects		Multilateral projects — New materials — Online courses — Awareness raising	Multilateral projects — ICT enabled learning	Multilateral projects
Multilateral networks		Multilateral networks — Language learning — Linguistic diversity	Multilateral networks	
Observation and analysis	Studies and comparative research – Contribution of Lifelong Learning to the Lisbon Process			Studies and reference material
Accompanying measures		Accompanying measures		

The Jean Monnet Programme

The Jean Monnet Programme supports the following actions:

Unilateral and national projects, which may include:

— Jean Monnet Chairs, centres of excellence and teaching modules

— Associations of professors, other teachers in higher education, and researchers specialising in European integration

— Support for young researchers specialising in European integration studies

— Information and research activities relating to the Community with the aim of promoting discussion, reflection and knowledge about the process of European integration.

Multilateral projects and networks, including support for the development of teaching modules and establishment of multilateral research groups in the field of European integration.

Operating grants may also be awarded to support the costs of European institutions or associations active in the fields of education and training.

Who can take part?

Territories

In general terms, the LLP is currently open to applicants from:

— 27 EU Member States (including various Overseas Countries and Territories, though special rules may apply to these regions[40])

— Iceland, Lichtenstein and Norway

— Turkey.

The Jean Monnet Programme is open to higher education institutions worldwide.

In February 2009, the Commission published an addendum to the Call for Proposals, announcing monies reserved in the 2009 Call to allow the candidate countries of Croatia and the former Yugoslav Republic of Macedonia to participate in the following actions: Erasmus University Charter and student and staff mobility actions; Leonardo da Vinci mobility actions; Comenius and Grundtvig in-service training; Transversal Programme Key Action 1 study visits; and in preparatory visits[41].

It is further proposed in 2010 to open the Multilateral Projects and Multilateral Networks actions that are administered centrally under the four sectoral programmes and the three Key Actions in the Transversal Programme to a range of 'third countries', including candidate countries,

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[40] For more detailed information, see Lifelong Learning Programme (LLP) Guide 2009: Part I: General Provisions pp 8-9, available at http://ec.europa.eu/education/llp/doc/call09/part1_en.pdf.
[41] For more detailed information, see http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:035:0018:0019:EN:PDF.

the countries of the Western Balkans, the Swiss Confederation and various others[42].

Applicants

Applications to the LLP must be submitted by institutions or organisations which have a legal status, with the exception of the Comenius and Grundtvig mobility actions and the study visits in the Transversal programme, for which applications may be submitted by individuals.

Applicants must be nationals of a country participating in the LLP or nationals of other countries who are resident in a participating country, either as permanent residents or registered as stateless or holding refugee status in the country participating in the programme.

As far as the individual sub-programmes are concerned:

— **Comenius** is open to all members of the school education community: pupils, teachers and other education staff, but also local authorities, parents' associations, higher education and research bodies, NGOs and other voluntary bodies representing those involved in education, as well as bodies providing guidance, counselling and information on lifelong learning.

— **Erasmus** is open to students, trainees, teachers and managers in tertiary level education and training establishments, as well as student and teacher associations; enterprises; social partners; NGOs and voluntary bodies responsible for the organisation and delivery of education and training; research centres and bodies providing guidance, counselling and information on lifelong learning.

— **Leonardo da Vinci** is open to people involved as learners in all forms of vocational training, except at tertiary level; people in the labour market; institutions and organisations involved in vocational training, such as training bodies and vocational schools; businesses, chambers of commerce and social partners; higher education and research bodies, NGOs and other voluntary bodies representing those involved in education, as well as bodies providing guidance, counselling and information on lifelong learning.

— **Grundtvig** is open to learners in adult education; all kinds of adult education institutions and organisations and their staff, whether working in formal, non-formal or informal adult education; establishments training adult education staff; associations of staff and learners; policy-makers, higher education and research bodies; enterprises; NGOs and other voluntary bodies representing those involved in education, as well as bodies providing guidance, counselling and information on lifelong learning.

— The **Jean Monnet** Programme is open to students and researchers in the field of European integration in all forms of higher education within and outside the Community; higher education institutions and their staff within and outside the Community; associations and representatives of those involved in education and training; public and

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[42] The final decision and administrative details will form part of the 2010 Call documents.

private bodies responsible for the organisation and delivery of education and training; and research centres and bodies concerned with issues relating to European integration within and outside the Community.

Application procedures

The LLP is the responsibility of the European Commission's **Directorate-General for Education and Culture**, based in Brussels. It has established a European level agency, the **Education, Audiovisual and Culture Executive Agency (EACEA)**, which is charged with the implementation and day-to-day management of the LLP. This includes drawing up Calls for Proposals, overseeing selection procedures, issuing contracts and monitoring progress, as well as overall financial control.

In line with the EU's policy on subsidiarity, however, a major responsibility for the administration of the LLP is devolved to Member States, each of which has one or more **National Agencies**[43], charged with the implementation and management of particular elements of the overall programme, as well as providing information and advice.

There are **three different application procedures**, depending on the type of project or activity:

— For all individual Mobility activities, Bilateral or Multilateral Partnerships and Unilateral or National Projects, applications are made to the National Agencies of each applicant or partner, who select projects and allocate funding.

— For Leonardo da Vinci Multilateral Transfer of Innovation Projects, requests are made to the National Agency of the project coordinator, which draws up a shortlist and makes recommendations to the Commission. The Commission makes a decision, and the National Agency then allocates funds.

— All other actions, including Multilateral Projects, Networks, Studies and Comparative Research and Accompanying Measures are handled through a centralised process. Applications are made directly to the EACEA which selects and funds the projects.

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[43] For a list of National Agencies, see Appendix 1.

The following table summarises these procedures:

	Decentralised		Centralised
	National Agency Procedure 1 (NA1)	**National Agency Procedure 2 (NA2)**	**Commission Procedure (COM)**
Types of action	— Transnational Mobility — Bilateral & Multilateral Partnerships — Unilateral and national projects (Transversal Programme)	Multilateral Projects for Transfer of Innovation (Leonardo da Vinci)	— Multilateral Projects and Networks — Observation and analysis — Operating grants — Unilateral Projects (Jean Monnet) — Accompanying Measures
Applications sent to	The appropriate National Agencies of each applicant institution or individual	The relevant National Agency of the coordinator of the application	The Education, Audiovisual and Culture Executive Agency
Applications evaluated by	The appropriate National Agencies of each applicant institution or individual	The relevant National Agency of the coordinator of the application National Agencies send shortlists of projects to Commission	The Education, Audiovisual and Culture Executive Agency
Decision taken by	The appropriate National Agencies of each applicant institution or individual	The Education, Audiovisual and Culture Executive Agency/European Commission	The Education, Audiovisual and Culture Executive Agency/European Commission
Funding distributed by	The appropriate National Agencies of each applicant institution or individual	The relevant National Agency of the coordinator of the project	The Education, Audiovisual and Culture Executive Agency

The application process for activities funded under the Centralised procedure consists of:

— An **online electronic application form (eForm)** for all applications, downloadable and able to be worked on offline on the applicant's own computer but which must be submitted online.

— A **two-phased application process** with certain elements of documentation being required only for those applications which are retained following the initial evaluation phase.

The application process for projects submitted under National Agency Procedure 1 is likely to vary in certain details from country to country[44].

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[44] For more information on application procedures, see the EACEA web site at http://eacea.ec.europa.eu/llp/index_en.htm and Chapters 9 and 11.

How long can actions last and what is the level of funding?

The details here vary enormously, as actions can range in length from a single day to a few years and there are different scales of funding available for different programmes. This is particularly the case of Mobility and Partnership actions that are handled by the National Agencies.

In the table on the next page we provide details of the minimum and maximum duration of these actions and, in the case of Partnerships, the minimum number of participating countries required for the 2009 Call for Proposals. Those requiring more detailed information, including levels of funding for Mobility and Partnership actions, will need to consult the Lifelong Learning Programe (LLP) Guide 2009: Part I: General Provisions[45] and the Lifelong Learning Programme (LLP) Guide 2009: Part II - Explanations by Action[46].

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[45] See http://ec.europa.eu/education/llp/doc/call09/part1_en.pdf.
[46] See http://ec.europa.eu/education/llp/doc/call09/part2_en.pdf.

Actions	Duration of action		Number of participating countries
	Min	Max	Min
Comenius Programme			
❑ Mobility			
• Preparatory visits	1 day	5 days	Not applicable
• Assistantships	13 weeks	45 weeks	Not applicable
• In-service training education staff	1 day	6 weeks	Not applicable
❑ Partnerships			
• Bilateral school partnerships	2 years	2 years	2
• Multilateral school partnerships	2 years	2 years	3
• Comenius Regio partnerships	2 years	2 years	2
Erasmus Programme			
❑ Erasmus Consortium Placement Certificate	1 year	Until 2013	Not applicable
❑ Mobility			
• Preparatory visits	1 day	5 days	Not applicable
• Students - Studies	3 months	12 months	Not applicable
• Students - Placements	3 months	12 months	Not applicable
• Teaching assignments	1 day	6 weeks	Not applicable
• Staff training	5 days	6 weeks	Not applicable
• Organisation of Mobility	Not applicable	Not applicable	Not applicable
• Intensive language courses	2 weeks	6 weeks	Not applicable
• Intensive programmes	2 weeks	6 weeks	3
Leonardo da Vinci Programme			
❑ Certificates		4 years	Not applicable
❑ Mobility			
• Preparatory visits	1 day	5 days	Not applicable
• VETPRO (VET Professionals)	1 week	6 weeks	2
• PLM (People in the Labour Market)	2 weeks	26 weeks	2
• IVT (Initial Vocational Training)	2 weeks	39 weeks	2
❑ Partnerships	2 years	2 years	3
❑ Multilateral projects: Transfer of innovation[47]	1 year	2 years	3
Grundtvig Programme			
❑ Mobility			
• Preparatory visits	1 day	5 days	Not applicable
• Assistantships	12 weeks	45 weeks	Not applicable
• Senior Volunteering Projects	2 years	2 years	3
• Adult education staff – In-service training	5 days	6 weeks	Not applicable
• Adult education staff – Visits & exchanges	1 day	12 weeks	Not applicable
❑ Workshops	5 days	10 days	Not applicable
❑ Partnerships	2 years	2 years	3
Transversal Programme			
Key Activity 1: Policy Cooperation and Innovation			
❑ Mobility: study visits for education and vocational training specialists	3 days	5 days	Not applicable

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[47] The maximum funding available to Leonardo Transfer of Innovation projects is €150,000 per year.

The table which follows includes the remaining LLP actions available in 2009, all of which are handled via the centralised application process. This table shows the maximum funding and duration, as well as minimum partnership requirements.

Please note that although the asterisked Multilateral Projects in the list may have a duration of up to three years, the maximum Community grant will not exceed the following amounts:

Comenius	300,000€
Erasmus	300,000€
Leonardo da Vinci	400,000€
Grundtvig	300,000€
KA2 Languages	400,000€
KA3 ICT	500,000€
KA4 Dissemination	300,000€

Actions	Maximum Community Contribution 75% / Maximum Community Grant (EUR)	Minimum duration of projects	Maximum duration of projects	Minimum number of participating countries
Comenius Programme				
❑ Multilateral projects	150.000/year*		3 years	3
❑ Networks	150.000/year		3 years	6
❑ Accompanying Measures	150.000/year		1 year	Not applicable
Erasmus Programme				
❑ Erasmus University Charter				Not applicable
❑ Multilateral projects	150.000/year*		3 years	3
❑ Networks				
• Academic Networks	200.000/year		3 years	31
• Structural Networks	200.000/year		3 years	5
❑ Accompanying Measures	150.000/year		1 year	Not applicable
Leonardo da Vinci Programme				
❑ Multilateral projects: Development of innovation	200.000/year*	1 year	3 years	3
❑ Networks	200.000/year		3 years	5
❑ Accompanying Measures	150.000/year		1 year	Not applicable
Grundtvig Programme				
❑ Multilateral projects	150.000/year*	1 year	3 years	3
❑ Networks	150.000/year		3 years	10
❑ Accompanying Measures	150.000/year		1 year	Not applicable
Transversal Programme				
Key Activity 1: Policy Cooperation and Innovation				
❑ Studies and comparative research	250.000/year		3 years	6
Key Activity 2: Languages				
❑ Multilateral projects: new materials / online courses / awareness raising	200.000/year*		3 years	3
❑ Networks	150.000/year		3 years	5
❑ Accompanying Measures	150.000/year		1 year	Not applicable
Key Activity 3: ICT				
❑ Multilateral projects	250.000/year*		3 years	3
❑ Networks	150.000/year		3 years	5
Key Activity 4: Dissemination and Exploitation of Results				
❑ Multilateral projects	150.000/year*		3 years	3
❑ Studies & reference material	150.000/year		3 years	3
Jean Monnet Programme				
Key Activity 1: Jean Monnet Action				
❑ Unilateral projects				
• Jean Monnet Chairs	45.000		5 years	Not applicable
• Centres of Excellence	75.000		5 years	Not applicable
• Teaching Modules	21.000		5 years	Not applicable
• Associations of Professors and Researchers	25.000		5 years	Not applicable
• Information and research activities	50.000		1 year	Not applicable
❑ Multilateral Projects: Research groups	100.000		2 years	3
❑ European Associations	100.000		1 year	Not applicable

Further information

The tables above provide only skeletal information on the various actions. If you are contemplating making an application, you really need to read carefully the detailed documents of the current Call for Proposals and the application forms.

— The Calls for Proposals are published in the Official Journal of the European Union (C Series)[48] and on the website of D-G Education and Culture[49].

— Applicants Guides and application forms for centralised actions are published on the EACEA web site[50].

— Applicants Guides and application forms for decentralised actions are published on the web sites of the various National Agencies[51].

You will also find more information on the LLP documentation in the first section of the Bibliography.

In this chapter, we have tried to give an overview of the main features of the LLP, including an outline of eligibility and application procedures. It is inevitably brief and lacking a lot of the detailed information that you will need, if you are intending to make an application for funding. We hope, though, that it has provided you with an initial orientation and an idea of what the LLP has to offer.

In the next two chapters, we will look at the detailed Objectives of the Programme and at the specific Priorities set for 2009, which applications will need to address.

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[48] See http://europa.eu/eur-lex/lex/JOIndex.do?ihmlang=en.
[49] See http://ec.europa.eu/education/llp/doc848_en.htm.
[50] See http://eacea.ec.europa.eu/llp/index_en.htm.
[51] See the list in Appendix 1.

Chapter 4

The objectives of the Lifelong Learning Programme

This chapter looks at the objectives of the Lifelong Learning Programme. You need to be familiar with these, if you are making an application for funding to the LLP. Application forms require you to nominate the Objectives and Priorities your proposal is addressing. You also need to make sure that your project, its description and its activities are tailored to help achieve them.

Objectives and Priorities

The objectives of the programme relate to the key challenges that face the European Union, as discussed in Chapter 2, and the role that education and training can play in addressing them.

The LLP distinguishes between:

— **The General Objective**: essentially the overall main aim of the LLP

— **Specific Objectives**: these break down the General Objective into more specific goals for the overall programme, as well as outlining additional goals for the various sub-programmes

— **Operational Objectives**: these represent a further refinement of the Specific Objectives of the various sub-programmes, in some cases with specific quantitative targets (e.g. at least 3 million pupils involved in joint educational activities during the period of the Comenius programme).

The objectives of the programme are set out in Decision 1720/2006/EC of the European Parliament and of the Council of 15 November 2006[52] which established the LLP and they remain constant for the period of its implementation.

In the previous chapter, we mentioned that the LLP is administered via a series of annual Calls for Proposals. For each Call for Proposals, the Commission also publishes a set of **Priorities**, which acts as a further level of targeting and relates to the activities to be funded under that particular Call. We will look at the Priorities for the 2009 Call for Proposals in the next chapter.

The remainder of this chapter lists the **Objectives** of the LLP, with notes of explanation where appropriate.

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[52] See http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_327/l_32720061124en00450068.pdf.

The Objectives of the LLP

General objective

The general objective of the Lifelong Learning Programme is to contribute through lifelong learning to the development of the Community as an advanced knowledge-based society, with sustainable economic development, more and better jobs and greater social cohesion, while ensuring good protection of the environment for future generations. In particular, it aims to foster interchange, cooperation and mobility between education and training systems within the Community so that they become a world quality reference.

Specific Objectives

The Lifelong Learning Programme also has the following **specific objectives**:

Specific objectives

(a)   to contribute to the development of quality lifelong learning, and to promote high performance, innovation and a European dimension in systems and practices in the field;

(b)   to support the realisation of a European area for lifelong learning;

(c)   to help improve the quality, attractiveness and accessibility of the opportunities for lifelong learning available within Member States;

(d)   to reinforce the contribution of lifelong learning to social cohesion, active citizenship, intercultural dialogue, gender equality and personal fulfilment;

(e)   to help promote creativity, competitiveness, employability and the growth of an entrepreneurial spirit;

(f)   to contribute to increased participation in lifelong learning by people of all ages, including those with special needs and disadvantaged groups, regardless of their socio-economic background;

(g)   to promote language learning and linguistic diversity;

(h)   to support the development of innovative ICT-based content, services, pedagogies and practice for lifelong learning;

(i)   to reinforce the role of lifelong learning in creating a sense of European citizenship based on understanding and respect for human rights and democracy, and encouraging tolerance and respect for other peoples and cultures;

(j)   to promote cooperation in quality assurance in all sectors of education and training in Europe;

(k)   to encourage the best use of results, innovative products and processes and to exchange good practice in the fields covered by the Lifelong Learning Programme, in order to improve the quality of education and training.

As noted above, each of the four sub-programmes has additional specific objectives, as well as a set of **operational objectives**, which tailor the overall programme objectives to the specific teaching and learning communities of the individual sub-programmes.

The Comenius sub-programme (for schools)

Additional specific objectives:

(a)   to develop knowledge and understanding among young people and educational staff of the diversity of European cultures and languages and its value;

(b)   to help young people acquire the basic life-skills and competences necessary for their personal development, for future employment and for active European citizenship.

Operational objectives:

(a)   to improve the quality and to increase the volume of mobility involving pupils and educational staff in different Member States;

(b)   to improve the quality and to increase the volume of partnerships between schools in different Member States, so as to involve at least 3 million pupils in joint educational activities during the period of the programme;

(c)   to encourage the learning of modern foreign languages;

(d)   to support the development of innovative ICT-based content, services, pedagogies and practice for lifelong learning;

(e)   to enhance the quality and European dimension of teacher training;

(f)   to support improvements in pedagogical approaches and school management.

The Erasmus sub-programme (for tertiary level education)

Additional specific objectives:

(a) to support the achievement of a European Area of Higher Education;

(b) to reinforce the contribution of higher education and advanced vocational education to the process of innovation.

Operational objectives:

(a) to improve the quality and to increase the volume of student and teaching staff mobility throughout Europe, so as to contribute to the achievement by 2012 of at least 3 million individual participants in student mobility under the Erasmus programme and its predecessor programmes;

(b) to improve the quality and to increase the volume of multilateral cooperation between higher education institutions in Europe;

(c) to increase the degree of transparency and compatibility between higher education and advanced vocational education qualifications gained in Europe;

(d) to improve the quality and to increase the volume of cooperation between higher education institutions and enterprises;

(e) to facilitate the development of innovative practices in education and training at tertiary level, and their transfer, including from one participating country to others;

(f) to support the development of innovative ICT-based content, services, pedagogies and practice for lifelong learning.

The Leonardo da Vinci sub-programme (for vocational education and training)

Additional specific objectives:

(a)   to support participants in training and further training activities in the acquisition and the use of knowledge, skills and qualifications to facilitate personal development, employability and participation in the European labour market;

(b)   to support improvements in quality and innovation in vocational education and training systems, institutions and practices;

(c)   to enhance the attractiveness of vocational education and training and mobility for employers and individuals and to facilitate the mobility of working trainees.

Operational objectives:

(a)   to improve the quality and to increase the volume of mobility throughout Europe of people involved in initial vocational education and training and in continuing training, so as to increase placements in enterprises to at least 80,000 per year by the end of the Lifelong Learning Programme;

(b)   to improve the quality and to increase the volume of cooperation between institutions or organisations providing learning opportunities, enterprises, social partners and other relevant bodies throughout Europe;

(c)   to facilitate the development of innovative practices in the field of vocational education and training other than at tertiary level, and their transfer, including from one participating country to others;

(d)   to improve the transparency and recognition of qualifications and competences, including those acquired through non-formal and informal learning;

(e)   to encourage the learning of modern foreign languages;

(f)   to support the development of innovative ICT-based content, services, pedagogies and practice for lifelong learning.

The Grundtvig sub-programme (for adult education)

Additional specific objectives:

(a)   to respond to the educational challenge of an ageing population in Europe;

(b)   to help provide adults with pathways to improving their knowledge and competences.

Operational objectives:

(a)   to improve the quality and accessibility of mobility throughout Europe of individuals involved in adult education and to increase its volume so as to support the mobility of at least 7,000 such individuals per year by 2013

(b)   to improve the quality and to increase the volume of cooperation between organisations involved in adult education throughout Europe;

(c)   to assist people from vulnerable social groups and in marginal social contexts, in particular older people and those who have left education without basic qualifications, in order to give them alternative opportunities to access adult education;

(d)   to facilitate the development of innovative practices in adult education and their transfer, including from a participating country to others;

(e)   to support the development of innovative ICT-based content, services, pedagogies and practice for lifelong learning;

(f)   to improve pedagogical approaches and the management of adult education organisations.

Note that quantified **mobility targets** have been set for the four sectoral programmes, in order to ensure that the programme has a significant, identifiable and measurable impact.

The Transversal and Jean Monnet programmes also have their own additional specific and operational objectives:

The Transversal programme

Additional specific objectives:

(a)   to promote European cooperation in fields covering two or more sectoral sub-programmes;

(b)   to promote the quality and transparency of Member States' education and training systems.

Operational objectives:

(a)   to support policy development and cooperation at European level in lifelong learning, notably in the context of the Lisbon process and Education and Training 2010 Work Programme, as well as the Bologna and Copenhagen processes and their successors;

(b)   to ensure an adequate supply of comparable data, statistics and analyses to underpin lifelong learning policy development, as well as to monitor progress towards objectives and targets in lifelong learning, and to identify areas for particular attention;

(c)   to promote language learning and to support linguistic diversity in the Member States;

(d)   to support the development of innovative ICT-based content, services, pedagogies and practice for lifelong learning;

(e)   to ensure that the results of the Lifelong Learning Programme are appropriately recognised, demonstrated and implemented on a wide scale.

The Jean Monnet programme

Additional specific objectives:

(a)   to stimulate teaching, research and reflection activities in the field of European integration studies;

(b)   to support the existence of an appropriate range of institutions and associations focusing on issues relating to European integration and on education and training in a European perspective.

Operational objectives:

(a)   to stimulate excellence in teaching, research and reflection in European integration studies in higher education institutions within and outside the Community;

(b)   to enhance knowledge and awareness among specialist academics and among European citizens generally of issues relating to European integration;

(c)   to support key European institutions dealing with issues relating to European integration;

(d)   to support the existence of high-quality European institutions and associations active in the fields of education and training.

In addition, all of the LLP programmes, and the actions supported by them, are expected to contribute to the **horizontal policies** of the Community, in particular by:

— Promoting an awareness of the importance of cultural and linguistic diversity in Europe, as well as of the need to combat racism, prejudice and xenophobia

— Making provision for learners with special needs, and in particular by helping to promote their integration into mainstream education and training

— Promoting equality between men and women and contributing to combating all forms of discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation.

These, then, are the Objectives of the LLP, which will remain unchanged during its existence. If you have not already done so, you may like to read Chapter 2 to understand more of the policy context which informs them.

In the next chapter we shall look at the particular Priorities attached to the 2009 Call for Proposals.

Chapter 5

Strategic Priorities

This chapter provides information about the particular priorities that have been announced in relation to the 2009 Call for Proposals. If you intend to make an application under the terms of this Call, you will need to be conversant with both the Objectives of the Lifelong Learning Programme and the Priorities, as the application form is likely to ask you to relate your project to specific Objectives and Priorities.

Priorities

In addition to the published Objectives, the Commission sets out Strategic Priorities for each round of proposals. These identify key areas for action in order to target the resources available for the Call more precisely. As part of the 2008 Call for Proposals, the Commission published a set of priorities which it intended would remain largely unchanged for the period 2008-2010 Calls, though with the possibility of some minor annual adjustments, if thought necessary to reflect developments in policy or to introduce new actions. The Commission indicated that, in the case of proposals of equal quality, those addressing these priorities have a higher chance of being retained for funding than those which do not.

In the 2009 update[53], the majority of the Strategic Priorities remain unchanged or are subject only to minor amendments. The document outlining the priorities is quite substantial. It begins with a brief overview of the general policy context of the LLP, before setting out its broad priorities for the period:

Priorities 2008-2010

The overarching priority of the Lifelong Learning Programme is to reinforce the contribution made by education and training to achieving the Lisbon goal of making the EU the most competitive knowledge-based economy, with sustainable economic development, more and better jobs, and greater social cohesion. Every part of the programme will give priority to action aimed at raising skills levels, supporting development and implementation of coherent and comprehensive lifelong learning strategies and to promoting innovation and creativity.

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[53] You can download the *General Call for Proposals 2008-10: Update 2009 – Strategic Priorities* at: http://ec.europa.eu/education/llp/doc/call09/prior_en.pdf.

Within this context, the priority areas for action in 2009 are:

— To support implementation of the Education and Training 2010 work programme, aiming at improving the quality of, access to, and openness of education and training systems in Europe, in particular by promoting coherence between all forms and stages of lifelong education and training, starting from an early age, and improving flexible learning pathways, for example, through the implementation of the European Qualifications Framework and systems for the validation of non-formal and informal learning, and lifelong guidance.

— To strengthen the role of education and training within the Lisbon process at both European and national level not only to promote competitiveness but also sustainable economic growth and social cohesion

— To support creativity and innovation in all systems and levels of education and training, in view of making the European Year of creativity and innovation 2009 a success.

— To implement lifelong learning strategies with a view to achieving greater efficiency and equity, particularly through action to reduce the number of people leaving school early or with a low level of basic skills, to foster the economic and social inclusion of migrants, to address socio-economic disadvantage, to support the early acquisition of key competences and sustainable funding, and to strengthen the knowledge base for policy and practice.

— To improve the quality of the education and training of all types of learning providers, in particular teachers and trainers.

— To modernise higher education systems, making them more coherent and more responsive to the needs of society. Modernisation is needed in order to enable European universities to play a key role in the Europe of Knowledge while facing the challenges of globalisation and to develop the knowledge, skills and competences (KSC) of Europeans and the capacity of Europe to be innovative and competitive. Modernisation should enable universities to play their role in the Europe of Knowledge and to make a strong contribution to the Lisbon Strategy for growth and jobs.

— To improve the quality and attractiveness of vocational education and training by implementing the priorities of the Copenhagen process at national level, for example through testing the implementation of the proposed European Credit Transfer and Accumulation System for VET.

— To improve the low levels of participation in adult learning, in particular of older workers and the low skilled, in order to reduce the obstacles to employment and increase people's capacity to adapt to rapidly changing living and working environments.

— To boost the mobility of citizens, particularly in terms of quality, including through implementation of the Recommendation on the quality of mobility and through use of the Europass framework.

— To reinforce sustainable development, including issues relating to energy and climate change, through actions in all sectors of education and training.

In addition to the 2008 Joint Progress Report of the Council and the Commission on the implementation of the 'Education and Training 2010' work programme, 'Delivering lifelong learning for knowledge, creativity and innovation'[54], a full set of reference policy documents on these topics can be found in the DG Education and Culture compendium of main policy initiatives and outputs since 2000[55].

The Commission also indicates that increased attention will be given across all the programmes to systematic **dissemination and exploitation of results** at both project and programme level. All project proposals will need to include a clear plan for the dissemination and exploitation of results.

The major part of the Strategic Priorities document is given over to the priorities of the individual sectoral sub-programmes and of the Transversal and Jean Monnet programmes. Each of these is introduced by a brief section outlining the policy context in which it is operating, followed by a rehearsal of the specific and operational objectives.

There then follows the most important part of the document which is a listing of the more detailed priorities attached to each of the measures or actions of the programme or sub-programme. This includes, for example, a listing of the key focus or content areas that are prioritised for a Partnership or Multilateral Project under the current Call. We have provided a brief summary below of some of the 2009 Priorities in areas that we think might be of particular interest to trade unions. For more detailed information, you will need to consult the document itself[56].

The 2010 update of the Strategic Priorities document is likely to be published in the final quarter of 2009. For further information, please consult the EACEA web site[57].

Erasmus

Mobility

— Increasing and ensuring high quality in organising student and staff mobility between higher education institutions and ensuring increased mobility from staff from enterprises for teaching in higher education institutions.

Multilateral Projects

— Projects focusing on cooperation between higher education institutions and enterprises which include a strong role for partners outside academia, including social partners. Among priority topics are developing educational services for advanced level vocational training, and designing strategies to promote exchanges and

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[54] See http://ec.europa.eu/education/policies/2010/natreport08/council_en.pdf.
[55] See http://ec.europa.eu/education/policies/2010/doc/compendium05_en.pdf.
[56] See http://ec.europa.eu/education/llp/doc/call09/prior_en.pdf .
[57] See http://eacea.ec.europa.eu/llp/index_en.htm .

cooperation between higher education institutions and enterprises, and developing improved access arrangements for people with non-formal or informal learning backgrounds or with alternative qualifications, such as those derived from prior experiential learning.

Thematic Networks

— Structural Networks focusing on widening access to higher education for non-traditional learners such as professionals, older learners and people with non-formal qualifications, and the recognition of prior non-formal and informal learning.

Leonardo da Vinci

Mobility

— For the mobility of trainees, a specific priority will be given to projects involving trainees in a dual apprenticeship system based on alternate learning or work-related training in enterprises.

— A specific priority will be given to the development of the competences of teachers, trainers and tutors, and to cooperation with SMEs.

Multilateral Projects

— Improving the transparency and recognition of competences and qualifications. This includes testing and implementing common European tools and frameworks, including Europass, ECVET and EQF[58], and exploring their application in particular sectors.

— Developing the quality and attractiveness of VET systems and practices. This includes developing and testing quality assurance procedures, including the use of the European Quality Assurance Reference Framework[59]. Another priority here is to enhance the governance and attractiveness of VET systems, through increased cooperation with social partners and other stakeholders.

— Developing the skills and competences of VET teachers, trainers and tutors, including their professional development and their learning of languages. Proposals should include developing the role of VET professionals in relation to systemic changes, such as the shift to learning outcomes and competence-based systems, as well as strengthening links between VET professionals and working life and developing pedagogical skills, including skills in curriculum development.

— Developing the vocational skills of adults in relation to the needs of the labour market. This includes involving the different stakeholders

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[58] See Chapter 2.
[59] See http://ec.europa.eu/education/lifelong-learning-policy/doc1134_en.htm .

in making VET more responsive to the needs of the labour market, taking into account changes such as the shift to learning outcomes and competence-based systems; developing and testing common sectoral methods and systems for the anticipation of skills needs, involving companies, sectoral organisations and social partners; and fostering the integration of learning with working life by promoting more learning-conducive workplaces, work-placed training and apprenticeship pathways.

— Raising the competence levels of groups at risk. This includes integrating groups with particular difficulties into the labour market by developing their work-related skills and competences, increasing the interest and participation of men or women in those VET fields where they are currently under-represented, and developing activities which help redress problems caused by demographic change, such as retaining older workers in employment.

— Vocationally oriented language learning (VOLL) and Content integrated language learning (CLIL) are priorities that apply across all Leonardo da Vinci Multilateral Projects.

Networks

— Projects should assist cooperation between VET actors, enterprises, economic sectors, social partners and training organisations on a sectoral basis.

— ECVET networks, supporting the testing of the European Credit Transfer System for VET in specific sectors.

— Stakeholder networks to identify and disseminate good training practice and to develop and reinforce cooperation between VET providers and enterprises.

Accompanying Measures

— Communication activities and events for the dissemination and exploitation of results.

Grundtvig

Mobility

— In-service training for staff – no particular priorities.

Multilateral Projects

— Developing key competences in basic skills, as well as helping learners to develop social, civic, cultural and intercultural competences and entrepreneurship in order to adapt to a changing society and the requirements of the labour market.

— Improving the quality of adult education, including exploring how the European Common Quality Assurance Framework for vocational

training[60] can be applied to adult education. Also developing joint approaches to improve the quality of qualifications for teachers, tutors and other staff in adult education, and intensifying local and regional cooperation between learning providers and enterprises within the concept of the 'learning region'.

— Improving the attractiveness of and access to adult education. This includes motivating individual learners to commit to learning, through guidance services and partnerships with enterprises; reinforcing digital competences and using ICT to widen access to adult learning; and improving the transparency and use of qualifications gained in adult education and facilitating access to vocational, general and higher education.

— Improving the validation of non-formal and informal learning outcomes, taking into account the different needs of adult learners, and identifying and disseminating mechanisms for the assessment of competences and recognition of formal, non-formal and informal learning of migrants.

— Promoting adult learning for marginalised and disadvantaged citizens and migrants. The priorities include developing alternative learning approaches to integrate or reintegrate marginalised and disadvantaged citizens into society and the labour market; sharing good practice on intercultural education, learning by marginalised citizens, and their linguistic, social and cultural integration; using sport to provide learning opportunities to marginalised and disadvantaged citizens.

— Learning in later life: intergenerational and family learning. This includes priorities on transferring knowledge, methods and good practice for senior citizen education; equipping senior citizens with the skills that they need in order to cope with change; and strengthening the contribution of older people to the learning of others.

Networks

— The priorities include language learning in adult education; academic networking in adult education; stakeholder networking in adult education, focused on strengthening cooperation between adult education providers, NGOs, civil society, social partners and decision-makers at local, regional, national and European levels; and the validation and certification of non-formal and informal learning outcomes.

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[60] See '*Fundamentals of a 'Common Quality Assurance Framework' (CQAF) for VET in Europe'* (2005), downloadable from http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_394/l_39420061230en00100018.pdf.

Transversal Programme Key Activity 1 – Policy Cooperation and Innovation

Mobility

— The priority topics for study visits include social inclusion and integration issues, improving the attractiveness and quality of VET, learning in a workplace environment, and increasing adult participation in education and training, for instance, through cooperation with social partners.

Studies and comparative research

— The priorities include the further development of adult learning provision, and promoting the attractiveness and quality of VET, including the governance of VET systems and improving understanding of the links between VET, higher education and working life.

Transversal Programme Key Activity 2 – Languages

Multilateral Projects

— Competence in and/or awareness-raising of the less used European languages; the acquisition of competence in languages to improve intercultural dialogue in Europe and its competitiveness in a globalised context; and developing and promoting methodologies to motivate language learners.

Networks

— Identifying, developing and disseminating information on good practice to improve intercultural dialogue; developing and promoting the mainstreaming of language learning and linguistic diversity at all levels of formal and non formal education; and developing and exchanging good practice in teaching languages to people with special needs.

Transversal Programme Key Activity 3 – ICT

Multilateral Projects

— Identifying and implementing innovative uses of ICT for lifelong learning, in particular for groups at risk of exclusion.

— Using ICT as a catalyst for innovation and creativity in lifelong learning.

Networks

— Addressing transversal issues for linking up and connecting learning communities in an innovative way through ICT, including building stronger links between school, home, workplace and local communities.

— Reinforcing the links between ICT, creativity and innovation skills.

Transversal Programme Key Activity 4 – Dissemination and Exploitation of Results

Multilateral Projects

Priority will be given to projects focusing on:

— Developing suitable infrastructure (analysis, mechanisms, methodologies and practical tools) to facilitate the exploitation of results

— Transversal action at the European level (by sector, theme or user group)

— Promoting 'exploitation of results' activities within key existing regional, European and/or sectoral networks.

National Priorities

One final point to remember is that, for the decentralised actions of Mobility, Partnerships and the Leonardo da Vinci 'Transfer of Innovation' Projects, which are handled through national Calls for Proposals, the National Agencies in the various countries are also likely to attach additional national priorities. You need to look at the web site of your National Agency or contact them for the relevant information and documents, if you are considering one of these actions.

We hope that the last three chapters have given you a good overview of the LLP and the important tasks it is setting out to accomplish. In the next section of the Handbook we will focus on its significance for trade unions.

Part 3

Chapter 6

Trade unions and the Lifelong Learning Programme

This chapter looks at the role of trade unions in relation to the Lifelong Learning Programme and at the European Trade Union Confederation's policies on lifelong learning.

Trade unions and lifelong learning

Trade unions are acknowledged as important stakeholders in the delivery of the Lisbon Strategy, most particularly in the development of the European systems of vocational education and training. As we have noted in Chapter 2, together with the other European social partner organisations, they have helped shape the development of education and training policy, through responses to the Commission Communication *Making a European Area of Lifelong Learning a Reality*[61]*,* and as key participants in the Copenhagen Process[62].

Their importance is recognised in the LLP itself, both by the specific inclusion of social partner organisations in the Access clauses of the Erasmus and Leonardo da Vinci Programmes and by their participation, under Article 11 of the Decision, in the work of the Committee overseeing the LLP in relation to all matters concerning vocational education and training[63]. Trade unions at national level are also seen as significant stakeholders in the development of lifelong learning and have an important role to play, at the level of both policy-making and implementation.

The ETUC has contributed to the development of the EU's policy on lifelong learning, pointing out both challenges and opportunities.

ETUC Resolution on Lifelong Learning

In June 2001, the ETUC published a Resolution on Lifelong Learning[64], in response to the Commission's Memorandum on that topic.

In the Resolution, the ETUC welcomed the move to develop a European Area of Lifelong Learning, but pointed out that, as well as offering new opportunities to the citizens and workers of Europe, the new knowledge based society could potentially create new categories of social exclusion.

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[61] See http://eur-lex.europa.eu/LexUriServ/site/en/com/2001/com2001_0678en01.pdf.
[62] See http://ec.europa.eu/education/vocational-education/doc1143_en.htm.
[63] See http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_327/l_32720061124en00450068.pdf.
[64] This forms part of the publication *Our Priorities: ETUC Resolutions 2001*, downloadable at
http://www.etuc.org/IMG/pdf/CES-prioEN002-2.pdf.

The ETUC also stressed the role of collective bargaining in ensuring that all workers benefit from lifelong learning. It called for an innovative and integrated approach from the EU, national public authorities, social partners, and bodies responsible for education and training, as well as individuals. Stressing the joint responsibilities of individuals and enterprises in promoting a better skills base for all, it called for the following principles to be followed:

— Access to lifelong education for all, including elderly workers, those on non-standard contracts, disabled people and those with a low level of basic qualifications

— Increased investment in human resources, both from public sources and from enterprises, with the provision of individual 'learning accounts' as an important means of realising this

— Time for training, including a new balance between working time and learning time, and the possibility of 'time credits' that could be used for training leave

— Recognition for the results of learning, whether formal, informal or non-formal, including transferability of the results of learning, and the accreditation of prior learning

— Organisation of work and training, with social partners negotiating training plans, including skills evaluation and the identification of training needs

— A new concept of partnership in developing quality systems and in anticipating and adapting them to changing needs

— A new role for education and training systems in offering guidance and support; a closer linkage between different types of learning; common skills frameworks and close attention to the learning needs of those who are socially excluded

— Innovation in teaching and training methods, including more use of ICT, a stronger European dimension and materials tailored to different learning speeds

— Bringing learning closer to home by establishing partnerships at local and regional level as well as local learning centres

— A strong role for social partners in establishing new rights and responsibilities with a view to achieving a European framework agreement on facilitating workers' access to lifelong learning.

The Resolution was an important input into the Communication, Making a European Area of Lifelong Learning a Reality.

Framework of Actions for the Lifelong Development of Competencies and Qualifications

Since 1986, the European Social Dialogue between the ETUC and the European social partner organisations representing employers has produced a series of 'Common Opinions' or joint statements on policy, many of which have dealt with education and training.

Building on this work, in February 2002, as a prelude to the meeting of the European Council in Barcelona, the ETUC, UNICE/UEAPME[65] and CEEP[66] signed a common agreement, entitled Framework of actions for the lifelong development of competencies and qualifications[67]. The Framework of Actions represents a significant intervention by the social partners in the field of lifelong learning. Whilst it is not a formal Framework Agreement like those on parental leave, part-time working and fixed-term contracts, it commits the social partners, at national and European levels, to work together on the development of competences and the acquisition of qualifications, as major aspects of lifelong learning.

The Framework of Actions identifies four priorities which are a matter for joint responsibility between the social partners:

— Identification and anticipation of needs in terms of skills and qualifications, both at enterprise and national/sectoral levels

— Recognition and validation of skills and qualifications, including provision of a system of transferable qualifications and identification of links and complementarities between recognised diplomas

— Information, support and advice to employees and businesses

— Mobilisation of all the available resources for the lifelong development of competences by all parties (enterprises, public authorities and social partners), together with the effective management of funding resources, particularly the European Social Fund.

The Framework of Actions commits the social partners to disseminating and promoting the document throughout the Member States, at all appropriate levels, taking account of national practices. They are also committed to producing a series of annual reports on the national actions carried out on the four priorities identified[68], which then inform the Commission's reports on the Education and Training 2010 Work Programme[69].

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[65] The representative bodies respectively of enterprises and employers working in the private sector and of SMEs.

[66] The representative body for enterprises and employers working in the public services sector.

[67] See http://www.etuc.org/a/580.

[68] The fourth of these reports can be downloaded from http://www.etuc.org/IMG/pdf/Fram_of_actions_LLL_evaluation_report_FINAL_2006.pdf.

[69] See http://eur-lex.europa.eu/LexUriServ/site/en/oj/2002/c_142/c_14220020614en00010022.pdf.

ETUC Resolution on Initial and Continuous Vocational Training for a European Employment Strategy

In March 2009 the Executive Committee of the ETUC adopted a further Resolution which addressed issues concerning VET, as a response to the two recent Communications from the Commission: the Updated Strategic Framework for European Cooperation in Education and Training and New Skills for New Jobs[70]. In responding to these documents and noting the updated priorities for the Copenhagen Process adopted in the Bordeaux Communiqué[71], the Resolution on Initial and Continuous Vocational Training for European Employment Strategy[72] considers that the framework proposed by the Commission confirms the priorities shared at European level:

— Transparency and compatibility of skills

— Recognition and validation of formal and informal learning

— Quality assurance mechanisms for training.

It further outlines five key priorities in lifelong learning and vocational training identified by the ETUC:

— Equal Access to training for all those who must develop their skills and aptitudes.

— Recognition and validation of aptitudes and skills irrespective of how they were acquired and their recognition in the company.

— The financing of training and employers' responsibility in this area.

— The anticipation of future skills needs.

— The participation of the social partners in vocational training and lifelong learning.

In considering these in detail, the Resolution calls, amongst other things, for:

— Member States to develop and put into practice methods for the recognition and validation of skills acquired outside of formal education or training

— Workers' rights to finance for training

— Private companies and public employers to have the responsibility to develop their workers' skills and competences

— Vocational training at the workplace as an essential part of lifelong learning

— The social partners to have a key role in the development at national level of individual qualifications and skills.

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[70] See Chapter 2.
[71] See http://ec.europa.eu/education/lifelong-learning-policy/doc/vocational/bordeaux_en.pdf.
[72] See http://www.etuc.org/a/6078.

The Resolution concludes by confirming that the ETUC and its members will use social dialogue and collective agreements to guarantee workers' rights to training.

The importance of the Lifelong Learning Programme for trade unions

The LLP represents a major intervention in transforming education and training in Europe and reflects many of the concerns expressed in the ETUC Resolution and the Framework of Actions. It provides opportunities, particularly in vocational education and training, both for workers themselves and also for workers' organisations at local, regional, national and European levels, dealing with issues that are of key concern to European trade unions:

— Increasing access to initial vocational training, the provision of modern apprenticeship schemes, and ensuring and improving the quality of vocational education and training. These are all issues in which European trade unions are actively involved: through representation on European, national, regional and sectoral training bodies, through political lobbying and through the collective bargaining of training opportunities and resources, as well as, in many cases, acting as actual training providers.

— Continuing vocational education and adult education both contribute to improving the skills and employability of workers, as well as strengthening the capacity and potential of the enterprises they work for.

— Education and training are acknowledged as crucial elements in helping to meet the challenges of globalisation and restructuring. The right to re-training is a key trade union demand in the event of major restructuring or closure.

— Trade unions are heavily involved in supporting innovative workplace learning, which is another of the priorities of the LLP.

— Trade unions have a vital role to play as advocates for lifelong learning, offering encouragement and counselling to workers who may often have only low levels of qualification or have previously had few educational aspirations or opportunities. The UK role of trade union learning representative, officially recognised in employment legislation, offers an interesting model here[73.]

— The LLP's objectives acknowledge the importance of the social and cultural benefits of education and training, not merely the economic. Here, too, the concerns of the LLP with issues of social integration, equality and antidiscrimination chime closely with those of trade union organisations.

— Within the LLP there is a major emphasis on mobility, as an aid to European integration and also as a personal, social and economic stimulus. Trade unions support mobility in the labour market and view

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[73] See http://www.unionlearn.org.uk/ulr/index.cfm.

this as a further means to promote social inclusion and cohesion, as long as it is accompanied by safeguards against social dumping.

— The priorities of the LLP also encourage initiatives which make use of the new European tools to assist with the recognition and validation of skills and qualifications[74]. As the social partners recognised in the Framework of Actions, this is a key priority if a worker's right to move in search of better employment is to be a reality.

— Finally, the LLP explicitly recognises the importance of the joint role of the social partners in achieving its objectives. It actively encourages the development of the social dialogue at all levels and provides concrete opportunities for cooperation between employers and workers representatives in developing and promoting new approaches to lifelong learning.

The LLP offers important new opportunities for trade unions. In the next chapter, we look in more detail at those elements of the LLP likely to be of most interest to trade unions and at some examples of the different kinds of projects that trade unions have previously been involved in.

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[74] See Chapter 2.

Chapter 7

Opportunities for trade unions

This chapter looks in more detail at the opportunities that the Lifelong Learning Programme can offer to trade unions. It includes information on some of the previous projects in this field that trade unions have led or participated in, as well as some advice on how to get involved.

What, then, are the opportunities for trade unions to be involved in the Lifelong Learning Programme?

First, let us remember that, irrespective of whether an individual trade union is itself directly engaged in an LLP action or project, its individual members may be involved in the programme in a variety of ways: for example, through some new professional training initiative in the sector in which they work, through a partnership scheme involving the school or university in which they are employed, or through an exchange or mobility action organised by an adult education centre to which they belong. Applicants for most of the actions supported by the LLP must be institutions, though there are opportunities for individuals to apply for mobility awards under the Comenius and Grundtvig sub-programmes.

As we have noted in the previous chapter, trade unions, as social partner organisations, are particularly encouraged to participate in the LLP and potentially have much to benefit from doing so. The opportunities offered by the programme are manifold and include:

— Promoting new learning opportunities for members

— Helping develop new training content, materials, approaches and methods of qualification in particular industries and sectors

— Developing new policy initiatives in education and training policy, applicable at regional, national and European levels

— Exchanging information on training methodologies, including the training of trainers

— Exploring new possibilities for the role of social dialogue in developing training opportunities for workers, including workplace-based learning

— Developing new initiatives in the professional training of trade union officers and representatives, including trade union trainers, as well as ways of ensuring that this training is accredited and recognised

— Helping promote the opportunities offered by the LLP and helping disseminate its results.

Areas of particular interest

Although individual trade union members may find themselves involved in practically any area of the LLP, the areas of the programme that are most likely to be of interest to trade unions are:

— **Leonardo da Vinci**: this sub-programme focuses on vocational education and training (VET). It is firmly rooted in the world of work and its precursor programmes have been a traditional focus of trade union interest.

— **Grundtvig**: with its particular attention on the challenges of an ageing population and on support for people lacking basic education and qualifications, Grundtvig holds a lot of interest for trade unions.

— Less immediately obvious perhaps, but by no means to be disregarded, are also:

  – **Erasmus**: although mainly focused on the academic side of higher education, this sub-programme is also concerned with advanced levels of vocational education and training and could be of interest, for example, to trade unions wishing to collaborate with universities in developing new VET initiatives.

  – **Transversal Programme Key Activity 1 Policy Cooperation & Innovation**: this offers opportunities for decision makers in vocational education and training, including trade unions, to undertake study visits to different EU countries.

  – **Transversal Programme Key Activity 2 Languages** and **Key Activity 3 ICT**: these offer exciting possibilities to become involved in both Multilateral Projects and Networking activities, where the focus covers more than the one of the sub-programme target groups.

  – **Transversal Programme Key Activity 4 Dissemination and Exploitation of Results**: this provides support for activities that promote the active exploitation of results, including seminars and conferences.

Ideas for action

— Many trade unions are involved directly in VET provision. They may find that a Partnership or a Multilateral Project under the appropriate sub-programme could help create innovative training possibilities, developed through cooperation with organisations in other EU countries. This could include the development of particular course modules, training materials, methodologies and qualifications.

— All trade unions are promoters of learning opportunities. Here the LLP provides opportunities to develop new practices within the workplace for negotiating access to learning and offering guidance and counselling, as well as opportunities to exchange information through study visits and to establish projects to transfer innovative practices developed elsewhere.

— Trade unions are also often involved directly in national training bodies, responsible for the organisation and accreditation of vocational training in particular sectors. Issues such as the mobility of labour and the recognition and transparency of qualifications are of vital interest and importance to trade unions and are among the principal concerns of the LLP. The programme offers many opportunities in these fields, both for experimentation through Multilateral Projects and for observation and monitoring through a Network.

— Individual mobility, for example, through Grundtvig, could allow the possibility for a trade union trainer to travel abroad to meet and exchange ideas with colleagues in another EU country, or to follow a course of in-service training[75].

— A Multilateral Project could involve working with others in similar situations in different countries to use education and training opportunities to combat particular forms of social exclusion and discrimination.

— Another project might focus on systems of recognising informal learning in a particular sector.

— Sector or industry-based language needs might provide the focus for another, taking an innovative approach to Vocationally Oriented Language Learning (VOLL)[76].

— Yet another might focus on the needs of a specific group – perhaps a group of older workers – or perhaps the provision of support services to incoming migrant workers, or dealing with the challenges facing senior citizens in a fast-changing knowledge culture.

— The LLP's Accompanying Measures offer support for dissemination and communication activities about the programme and its results, as well as activities that could assist with transfer and exploitation. These could include conferences for particular sectors, including, for example, an event which brought together social partner organisations involved in different projects to share their work and experiences.

The possibilities are endless…

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[75] Those interested in arranging Mobility projects will find it helpful to be aware of the European Quality Charter for Mobility. For more information, see
http://europa.eu/legislation_summaries/education_training_youth/lifelong_learning/c11085_en.htm.
[76] Vocationally Oriented Language Learning (VOLL) is an approach to the teaching of a foreign language based on the professional needs of a specific vocational group.

Previous trade union projects

Below we list 25 examples of current and past transnational projects in the field of lifelong learning that European trade unions have been involved in. In some cases they have acted as project promoters and coordinators; in others they have contributed as partners. We have mapped the predecessor programmes under which they were funded onto the current LLP sub-programmes and actions[77]:

LLP Prog	Action	Description	TU Coord	TU Partner
LdV	Mob	A one-week exchange visit of two representatives from a Slovenian education centre to an Austrian trade union training centre and subsidiary organisations enabled the discussion of key education and labour policy issues with the respective heads of department/managing directors. The possibilities for cooperation on EU projects were also examined.	X	
LdV	Mob	8 youth representatives of the Austrian trade union, ÖGB, went to Sweden to gather information about the role of Swedish trade unions in the field of continuing education and training both in a company context and beyond.	X	X
LdV	Mob	This exchange project for trainers of people facing special disadvantages in the labour market (the long-term unemployed, persons with basic qualifications) allowed the exchange of experience, as well as the comparison and assessment of pedagogic approaches and teaching and learning aids. Its aim was to improve the quality of vocational training by specially adapted qualification programmes and teaching methods, and thus to improve the labour market opportunities of the trainees.	X	
LdV	Mob	Landscape gardeners undergoing basic vocational training had the opportunity to go to Ireland or England for three weeks of occupation-related learning. During their visits, they were able to gather information on the vocational education and training systems of the host countries, visit enterprises and become familiar with the working situation there, establish occupational and social contacts and improve their knowledge of English. The additional occupational and foreign language skills, as well as intercultural competences acquired, have enhanced their employment and mobility perspectives.	X	

[77] Key to abbreviations: **Coord** – Coordinator; **LdV** – Leonardo da Vinci; **GR** – Grundtvig; **TR KA2** – Transversal Programme: Languages; **TR KA3** – Transversal Programme: ICT; **MOB** – Mobility; **MP** – Multilateral Project; **DOI** – Development of Innovation; **TOI** – Transfer of Innovation; **PART** – Partnership.

LLP Prog	Action	Description	TU Coord	TU Partner
LdV	Mob	15 Austrian apprentices took part in a three-week practical training in Great Britain. Part of their stay was dedicated to attending an English language course, the other part to practical work in a British company.		X
LdV	MP TOI	The partnership in this Transfer of Innovation project on European Languages for Secretaries includes training agencies, an IT company and a German trade union training organisation. The project centres on extending a web portal to improve the language skills of secretarial and administrative staff.		X
LdV	MP TOI	This Transfer of Innovation project, involving an Italian trade union, takes a fresh approach to the issues of gender equality, bringing together the issues of equal opportunity, enterprise process organisation and quality systems. Viewing equal opportunity as a quality factor per se, it is producing training modules and materials for HR managers and Quality Auditors/Managers.		X
LdV	MP DOI	This project focused on the potential for cooperation between public authorities and social partners in promoting innovation within lifelong learning. It involved an Italian trade union and promoted the identification, assessment and recognition of non-formal and informal learning. It produced a multilingual glossary on anticipating training needs, a series of national reports on patterns of cooperation and effectiveness in anticipating these needs, and a catalogue of support tools and training practices.		X
LdV	MP DOI	With an Austrian trade union as a partner, the VQTS project is strongly linked to the process of establishing a European Credit Transfer system for VET and aims to increase the recognition of skills and qualifications in the mechanical engineering sector on a European level. The most innovative element of the project is the attempt to create a common, systematic procedure for the international transfer of acquired qualifications, taking into account all the specifics of the systems currently in use in the participating countries. The main target group for the project's results are students and apprentices in initial vocational training who wish to undertake learning and training periods abroad. The field of mechanical engineering was selected as a model for developing and testing this procedure. Further potential users of the project's results are institutions providing VET, and companies and policy-makers. This project won the Leonardo da Vinci Gold Award in 2006.		X

LLP Prog	Action	Description	TU Coord	TU Partner
LdV	MP DOI	This project set out to reduce the information and communications gap between vocational training and employment. Working with employees, employers and trade union representatives in the transport sector, it developed an ICT-based tool to both raise awareness of the importance of continuing vocational training and provide a self-evaluation instrument for transversal competences.		X
LdV	MP DOI	Collaboration between a trade union training organisation and national agencies supporting deaf people produced an innovative methodology to be applied in vocational guidance and counselling processes, which enabled deaf people to be integrated into vocational training and the labour market. The process centred on a 'tandem method' with both a deaf and a hearing counsellor working together with deaf clients.		X
LdV	MP DOI	This project focused on sector-specific language training and was focused on SMEs in the food-processing and metallurgical industries. It produced a language-teaching CD-ROM (Dutch, French, English, Italian, Spanish and German), which workers in those industries could use either for study with a trainer or for self-study.		X
LdV	MP DOI	In the health service, language and cultural barriers in communication with foreign patients not only create difficulties in diagnosis, treatment and administrative matters, but they may also cause an unnecessary delay in the healing process. This project, led by an Austrian trade union, developed learning materials to increase the job-related foreign language and intercultural competences of staff working in social and medical care.	X	
LdV	MP DOI	Coordinated by an Austrian trade union training organisation, this project was concerned with developing standards for further training in the field of digital media design. It set out to improve the situation of workers without formal qualifications in this field (lateral entries from other fields of occupation, older workers); to increase the horizontal and vertical mobility of workers in this industry; and to raise the quality level in the education market.	X	

LLP Prog	Action	Description	TU Coord	TU Partner
LdV	MP DOI	The aim of this project was to help model the large number of young people who drop out of vocational training courses. It developed innovative methods which could be applied to the entire vocational training system, consisting of entry guidance (before the disadvantaged person enrols at the training institute), guidance in tandem with the training (throughout the training period) and end-of-course guidance (transition to the world of work).		X
LdV	MP DOI	This project, which won a Leonardo da Vinci award in 2006, was led by a national educational fund, jointly established by 3 trade unions and a national employers' confederation to raise the skills and qualifications of workers from the participating unions. It focused on extending the guidance and counselling available to low-paid workers and aimed to help them participate in lifelong learning through the provision of vocational guidance in the workplace. The project delivered an online course in 11 languages on workplace guidance, targeted at trade union activists, vocational guidance counsellors and human resource personnel.	X	X
LdV	NET	This network project includes 14 trade union organisations and universities from 9 EU Member States. Its principal aim is to facilitate the exchange and transfer of models of cooperation between trade unions and universities in the delivery of work-based lifelong learning to trade union members and employees. It intends to present and explore 4 distinct models of cooperation, to build a web resource kit to support such activities, to produce a report on work-based learning partnerships in 6 of the partner countries and to organise a final conference for trade unions, universities and learners to share experiences.	X	X
GR	PART	This Grundtvig Partnership involved a trade union training organisation, a further education college, a VET centre and 2 local authorities in an exchange of methods and learning techniques for integrating persons who are disadvantaged in the labour market into learning processes and low-threshold programmes.		X
GR	PART	The objectives of this Partnership, with partners in Austria, Bulgaria and Poland, were: an exchange of experience and know-how regarding e-learning methodology; standardising special technical terms within the partnership; and disseminating the project results.		X

LLP Prog	Action	Description	TU Coord	TU Partner
GR	PART	The organisations in this Partnership, all active in the field of adult education and related sectors, worked together on the theme of Gender Equality in Learning and Employment. The work involved exchange and analyses of proven strategies, measures, projects and experience of gender equality issues; comparison of the current legal framework regarding equality in the partner countries and a comparison of statistical data; organisation of a conference to present the best strategies; and establishing a network in this field.		X
GR	MP	Led by the Swedish trade union confederation, LO-S, the aim of this project is to produce a European model to analyse the learning needs of trade union trainers, which will keep pace with the rapidly increasing Europeanisation of industrial relations. Products of the project will include European specifications of jobs and diplomas for trade union trainers, a methodology for identifying training needs and translating them into learning actions, evaluation instruments and wide-scale dissemination.	X	X
GR	MP	Led by the Maltese General Workers' Union in collaboration with trade unions from other countries, this project aimed to develop cooperation between organisations representing employers and those representing employees on information and training measures with the aim of preventing workers in the textile processing industry from developing chronic arthritis (RSI).	X	X
GR	MP	This project aims to introduce a new model programme for training teachers who work in non-formal education. It sets out to establish a learning community of teachers and trade union activists who will design an innovative set of professional standards and competences for work in non-formal education, as well as a number of teaching materials.		X
GR	MP	There is a general lack of adequate education counselling models for blind and visually impaired people. This is one of the main reasons why blind and visually impaired people are excluded from many education programmes and selection procedures, and consequently do not embark on suitable careers. This project developed an innovative education counselling model for blind and visually impaired people, which includes both individual aptitude diagnosis and education counselling.	X	

LLP Prog	Action	Description	TU Coord	TU Partner
TR KA2	MP	The central objectives of this project are to promote linguistic diversity in Europe. The project builds on 12 web sites, established in a previous project, each devoted to a different European language with information on innovative ways of language learning in the partner countries. The project complements these with a further 11 web sites dedicated to other European languages.		X
TR KA3	MP	This project centred on the benefits that modern ICT learning techniques could bring to adult education, particularly with regard to education and training for persons with low levels of formal education who are at risk of social exclusion. In order to promote this approach, the international partnership of this project co-operated with representatives of the target groups, adult education specialists and IT experts in order to create a virtual learning environment for teaching basic skills and knowledge. In addition, the project included extensive public relations work on the use of ICT learning techniques in basic education.		X

You will find more examples of successful projects on the LLP web site and on the web sites of the National Agencies.

How to get involved

There are different possibilities of involvement in LLP activities, depending on the kind of action, your own and your organisation's experience and what precisely you want to achieve.

First, you need to be clear about the need that the action is going to address. It may be an individual need to increase your own experience, skills and qualifications as a trainer or decision maker, but this should always relate as well to the needs of your organisation. Although we have emphasised the opportunities offered by the LLP, if they are to be realised they must contribute to the needs perceived by your own organisation. When you have identified what it is you are trying to achieve, you can think about the most appropriate way to proceed and the most appropriate form of action.

Next, think about the amount of time and effort that is going to be involved. If you have decided that a Mobility action is the most appropriate, this is likely to involve only your own and one other organisation. It is entirely different in scale from a two-year Multilateral Project or a Network with thirty partners.

If your idea does involve a large-scale project, consider carefully whether your organisation has the capacity to manage it. If not, you may be able to involve someone else as the promoter or applicant organisation but still

remain a partner. Alternatively, you might remain as the promoter but pass the responsibility for day-to-day coordination and management to another partner.

In fact, in many of the projects we have listed above, trade union organisations were partners, rather than promoters. They both brought a valuable contribution to the project and gained valuable experience and results in the process. For many organisations, the best way to make a start in European projects is as a partner organisation.

As we have seen, cooperation between organisations in different European countries is at the heart of the LLP. How then does one become a partner or find others?

There are various ways of making oneself known:

— The EACEA and the European Commission organise Information Days and conferences on different aspects of the LLP. These provide an opportunity to meet and talk with other potential applicants[78].

— National Agencies organise contact seminars and similar events[79].

— ETUI organises information events from time to time, specifically for trade unions[80].

— The EACEA web site has some details of potential partners in a partner search database for the LLP[81].

— If you have an idea for a Mobility action, Partnership, Multilateral Cooperation Project, Multilateral Network or Accompanying Measure under any of the four sectoral sub-programmes, you can also apply to your National Agency for a grant for a Preparatory Visit. This could be used as a contribution to the costs of attending a conference or contact seminar, or of travelling to meet and work with prospective partners to develop an idea for a project under one of these actions.

We have said that for many trade unions a role as partner may be the most appropriate starting place. Some, though, will undoubtedly have the capacity and the vision to become project promoters. In the next chapter we will look briefly at what is involved in planning a project.

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[78] See http://eacea.ec.europa.eu/llp/infoday09/infoday_2009_en.htm Where you can also download the PowerPoint presentations and videos from the January 2009 Info Days.
[79] See Appendix 1 for details of the National Agencies.
[80] For more information on the ETUI EU Information Service, see Appendix 3.
[81] See http://infodays.teamwork.fr/frameset.php?la=1&page=partner_tool.

Part 4

Chapter 8

Planning a project

This chapter outlines some of the key steps involved in planning a substantial collaborative project – a Partnership, a Multilateral Project or a Network, say. What is set out here may also be helpful if you are thinking about a Mobility action, although some elements may not be relevant in that context. If you are planning a project application, we would also strongly suggest that you read Part I of Trade Unions and Transnational Projects[82], which provides more detailed guidance on many of the points dealt with here and includes chapters on project planning and evaluation.

First thoughts

We can all have bright ideas about doing something new, but moving from that first flash of inspiration to the point of submitting a fully-developed project proposal takes time, dedication, clarity of thought and careful planning.

Let us assume that you have all the necessary commitment and energy to pursue your idea. How should you proceed?

First, test your idea rigorously.

— Why do you think it is important?

— Will it address significant needs and problems that your organisation or its members are experiencing?

— What evidence do you have for this?

— Have there been previous efforts to address these issues? You will find databases of projects funded under the previous Leonardo da Vinci programme[83], as well as compendia of projects selected in the previous LLP Calls for Proposals[84]. The EU Directorate-General for Education and Culture has also recently launched a new electronic platform, *EVE*, containing information on projects funded under its programmes for education, training, youth, culture and citizenship[85]. These sources may provide inspiration for ideas to be developed further, as well as helping you avoid fruitless repetition.

— Are these likely to be common challenges faced by organisations in other European countries, or are they locally specific? If the latter, they may not provide a sound basis for a European project.

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[82] See
http://www.etui.org/education/resources/trade_unions_and_transnational_projects_sixth_edition__1.
[83] See http://ec.europa.eu/education/programmes/llp/leonardo/data_en.html.
[84] See, for example,
http://eacea.ec.europa.eu/llp/general_information/leonardo_da_vinci_en.htm#links for Leonardo,
http://eacea.ec.europa.eu/llp/grundvig/grundvig_en.htm for Grundtvig,
http://eacea.ec.europa.eu/llp/ka2/key_activity_2_en.htm for KA2 Languages and
http://eacea.ec.europa.eu/llp/ka3/key_activity_3_en.htm for KA3 ICT.
[85] See http://ec.europa.eu/dgs/education_culture/eve/index_en.htm.

As ideas are tested, some will inevitably fall by the wayside, as you realise that they are inappropriate or unrealistic. Those that do stay the course will almost certainly change considerably as you develop your proposal.

Developing the idea

Once you are convinced that the idea has some strength, put it on paper:

— Start by outlining the context and the rationale for the project and define the needs and challenges that it seeks to address.

— Then set out the aim and objectives of the project. Make sure that these are clear, concrete and realistic and that you indicate clearly who will be the immediate beneficiaries of the project.

— Next set out in broad terms the method and approach which you think would best achieve those goals.

— Describe any concrete products that you think the project would produce: for example, training modules and learning resources, web sites, reports, specifications for qualifications, or new methodologies.

— Sketch out what you think the overall results of the project are likely to be, as well as the longer-term impact and benefits.

— Finally, consider how you might ensure that the benefits of the project are sustained and exploited when the period of initial project funding is over.

Organisational support

This is the point at which you should share your ideas and seek the support of your organisation.

— Show your initial outline to colleagues and ask for feedback. They may have useful advice to offer and can often help to improve your idea. Some may also be able to contribute directly to the work of the project, if you make a successful application.

— Make sure that your idea is aligned with the general objectives and policy of your organisation. If you are to progress the idea, you will certainly need institutional support, both financial and moral. You will need to negotiate time and resources to allow you and your colleagues to participate and your organisation will be one of the major stakeholders in the project. Involve key decision-makers from the outset and plan how you will keep them as informed and enthusiastic supporters.

— Can your organisation also help bring added-value by drawing on wider networks? Is it linked perhaps to a group of national experts on the topic who can act as an occasional reference point for the project? Could it put you in touch with, say, appropriate companies, a regional authority or a local community organisation that might offer useful feedback or facilities as the project proceeds?

— Be clear about what expertise and resources your organisation will be able to provide and what its strengths and its limitations are. This will

help you identify what help you will need from partners and where the added-value at a European level lies.

Finding partners

You have a first sketch of the idea which has won the support of your organisation. Now you need to find appropriate partners to contribute to the detailed planning and help realise the project.

— You have probably already begun to think about which area of the Lifelong Learning Programme your project idea might most closely fit. If so, you will already have some initial indication of the minimum requirements to establish an eligible consortium to apply for funding. This should not, however, be your starting point. Think rather about the needs of the project: what aspects you and your immediate colleagues can deliver, where you will need outside assistance, and what particular strengths additional partners can bring.

— Think about the geographical spread of your partnership. There may be particular advantages to be gained by bringing together partners from both northern and southern Europe and by linking new and old Member States. The key question should be whether they face similar challenges and whether they might have something distinctive to offer to a collaborative response. Often the answer may lie in finding partners at a regional level, in communities and industries in different geographical situations who are experiencing similar problems.

— Consider, too, in planning your consortium, the benefits that can be brought by including a range of different types of organisation, not simply a broad geographical distribution. A multi-actor partnership, involving a combination of trade unions, companies, local and regional authorities, education and training establishments, or research bodies, can often make a stronger project team than one that contains a single type of organisation.

— Think carefully about the size of the partnership in relation to the scale and ambition of the project. Do not make it too small to be effective, but equally do not make it unnecessarily large. Partners should be invited because they genuinely have something essential and distinctive to contribute and all should have a clear and necessary role to play.

— Make sure that each of the partners has a clear motivation to become involved, otherwise their participation is likely to be half-hearted. Be clear about what they have to gain from the project and understand that this is likely to differ from partner to partner. It is important that the project should enable them all to realise their objectives.

— But how best to find partners? You will find this easier, once you have clarified the roles that you are looking for.

  – You might first try your own contacts and networks. Ask people you know if they have suggestions for potential partners, perhaps ones

that they have already collaborated with on other European projects.

- Look in the European Commission's databases and compendia of previous projects in the same field[86] or the partner search databases from the LLP Infodays[87].

- Contact your National Agency[88]. They may be able to provide advice on your proposal and may also be able to assist with funding to attend one of the LLP conferences or contact seminars, where themed workshops will enable you to meet potential colleagues from other countries.

- For other possible trade union contacts, ask the ETUI EU Information Service[89].

- Undertake some research on the organisations you have identified. Look at their web sites, talk to people who might know them, find out about their work and their experience. Try, if possible, to meet them face-to-face.

— Once you have identified possible partners, send them a copy of your outline proposal and ask for their comments. Be prepared to adapt it to take account of their concerns, as long as this does not deflect from its original aim or make it too unwieldy.

Detailed planning

Now you need to work with your partners on turning the outline of your original idea into a detailed operational plan.

— You need to plan this stage of the process quite carefully. You will probably need to coordinate the planning and prepare the bulk of the documentation yourself but you will certainly need input and feedback from all the partners, if the plan is to be robust. Think carefully about how you will achieve this. Can you arrange a planning meeting, perhaps partly supported by LLP grants for a Preparatory Visit? If not, could you use phone- or video-conferencing facilities? Or will communication be restricted to e-mail?

— Start the detailed planning by breaking the project down into major blocks of work (or workpackages) and then into more detailed individual tasks. Describe what each task is going to achieve and any specific outputs that it will produce.

— Remember that, in designing your project, you need to think not just about the central activities, but also about how you will manage the project, how you will monitor and evaluate its progress, and how you will ensure that its results are widely disseminated and exploited. For

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[86] See *inter alia* http://ec.europa.eu/education/programmes/llp/leonardo/data_en.html, http://eacea.ec.europa.eu/llp/general_information/leonardo_da_vinci_en.htm#links, http://eacea.ec.europa.eu/llp/grundvig/grundvig_en.htm, http://ec.europa.eu/dgs/education_culture/eve/index_en.htm and http://ec.europa.eu/dgs/education_culture/eve/index_en.htm.
[87] See, for example, http://infodays.teamwork.fr/frameset.php?la=1&page=partner_tool.
[88] See Appendix 1 for details of National Agencies.
[89] For more information on the ETUI EU Information Service, see Appendix 3.

many projects, including all of the LLP Multilateral Partnerships, Networks, Accompanying Measures, Studies and Comparative Research actions, you will need to include separate workpackages on each of these. We look at these workpackages in more detail below.

— Next, add a time dimension to each of the tasks and map them out, both in relation to the overall project period and to each other, to produce an overall project calendar. You can make a visual representation of your project workplan by making a Gantt chart. This is a bar chart which maps individual workpackages and/or tasks on to the project calendar. It is constructed with a horizontal axis representing the total time span of the project, broken into segments, and a vertical axis representing the workpackages or tasks that make up the project. Each of these is represented by a horizontal bar. You can make a simple Gantt chart using a spreadsheet program or a table in a word processor90. If you have a large and complex project, however, you may find it helpful to use a project management software program that can produce a more sophisticated Gantt chart, showing the relationships and interdependencies between tasks.

— Then you need to think about who needs to be involved in each workpackage and task and who will be responsible for ensuring its achievement. This is part of identifying the task resources needed. Alongside the human resources, you will probably find it useful to note if there are particular physical resources (rooms, equipment, publications, etc) required for the various tasks.

— Lastly, using the structure and information from the task breakdown, you can begin to calculate the likely cost of the project. Here, though, you will first need information from partners: for example, on staffing costs, on subsistence costs, on room hire, on translation and interpretation costs. Once you have this, work through the whole project, workpackage by workpackage and task by task. For each task you will have already estimated the number of days required from each contributor, so once you have information about daily wage rates, it will be easy to calculate the total staff costs, and similarly for travel and subsistence and other costs. For most projects, with the possible exclusion of some of the smaller Mobility actions, you will find it easiest to use a computer spreadsheet program, such as Microsoft Excel, to prepare this.

Project management workpackage

As well as the central activities of the project, you need to take account of all the tasks involved in managing the project. This will include decision-making, legal and financial administration, reporting activities and communication.

— When you have identified the particular tasks, you need to give some further consideration to roles in relation to the management of the project:

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90 The 2009 application forms for the centralised actions include a simple Gantt chart to be completed using Excel. For a more detailed consideration of project scheduling, see Chapter 5 of **Trade Unions and Transnational Projects**.

- If your organisation is acting as the applicant organisation and promoter of the project, it will also be the contractor organisation (i.e. the organisation signing the grant agreement with the Commission and taking ultimate legal responsibility for the execution of the project). Will it also handle the coordination and day-to-day management of the project, or is this a task to be assigned to one of the partners, perhaps an organisation with more experience in this field?

- Who will be the Project Director, responsible for leading the work? Will the Director also manage the project or will there be a separate Project Manager? Who will be responsible for overseeing the individual workpackages?

- How will decisions be made? Will you establish a Project Management Committee? If so, will all the partners be involved?

- How will you ensure adequate communication and information flows within the consortium? What will the common working language be? Is this likely to present any problems? If so, how do you propose to deal with them? Can you include any language preparation activities in the project?

— Don't forget that these management tasks, too, will have costs attached: staff costs, travel and subsistence for meetings, and communication and administration costs (although these last two will form part of the project's indirect or overhead cost – see Chapter 10).

Evaluation workpackage (Quality Plan)

Think carefully about the steps you will take to monitor progress, to evaluate the work of the project and to ensure its quality. Use a separate workpackage to detail this work.

— Distinguish between **formative** evaluation, providing feedback on progress during the lifetime of the project, principally to the project team, and **summative** evaluation, undertaken at the end of the project, to review its achievements and highlight significant issues arising from its results, for the benefit of partners and stakeholders.

— It will help your evaluation process, if you already have clearly elaborated objectives against which to measure progress. Make sure they are **SMART**:

- **S**pecific – dealing as precisely as possible with one particular aspect of the project's aim

- **M**easurable – containing clearly defined criteria by which their achievement can be measured. These may be either **quantitative** (i.e. measurable and objectively verifiable) or **qualitative** (objectively verifiable but with non-measurable criteria, relating normally to changes in attitude, behaviour, processes or structures).

- **A**chievable – being realistic in terms of the time and resources available

- **R**elevant – relating directly to the overall aim of the project

- **T**ime-related – providing a clear time frame within which the objective should be realised.

— Your evaluation should normally cover both the work process of the project and its outcomes and products.

— Consider carefully how you will organise the evaluation tasks. At what points of the project process will you conduct evaluation activities? What form will they take? How will you collect data e.g. will you use questionnaires or interviews? Will you test products with user groups? Who will be responsible for conducting the evaluation? Will you engage an external evaluator? Will one of the partner organisations act as evaluator? Consider the aims of your project and its target group(s) and decide what would be the most appropriate ways of handling evaluation.

Dissemination and Exploitation workpackages

The LLP is committed to maximising the impact of its investment and to ensuring that the results of projects have use and value well beyond the project period. Consequently, every project needs to include a dissemination and exploitation plan[91].

— **Dissemination** is a process of **providing information** about the results of a project to other key actors who will be interested in their relevance and effectiveness. Dissemination activities might include developing a project web site, mounting press and media campaigns, organising a conference to promote the results of the project.

— **Exploitation** involves **mainstreaming** (or transferring the successful results of a project to decision-makers in other organisations and to other contexts) and **multiplication** (or convincing individual end-users to adopt these results). It concerns the sustainability of the project results and in some cases may also include commercialisation of products.

— Dissemination and exploitation are increasingly referred to in the context of the LLP as **valorisation** (i.e. adding value to the results).

— The responsibility for dissemination and exploitation should be shared by all the partners. All should play an active but clearly defined role.

— To be successful, dissemination and exploitation need to be built in from the earliest stages of the project and should take the form of carefully planned and targeted actions. They need to form part of a continuing process, with activities occurring at appropriate moments throughout the lifecycle of the project. They should also include plans to ensure that the results of the project are accessible and useable after the end of the project period, to achieve maximum impact and sustainability[92].

— In your dissemination and exploitation plan, ensure that the tasks are described in detail, are clearly allocated to specific partners and include,

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[91] See section 5 of the *Lifelong Learning Programme (LLP) Guide 2009 – Part I: General Provisions,* downloadable from http://ec.europa.eu/education/llp/doc/call09/part1_en.pdf.
[92] In addition to the section in the LLP *Guide*, the DG Education and Culture website has some helpful general advice on dissemination and exploitation. See
http://ec.europa.eu/dgs/education_culture/valorisation/index_en.html.

wherever possible, quantified targets (e.g. numbers of people reached by particular activities or events, number of web site hits, number of articles published, number of possible multipliers contacted and outcomes). Describe the methods you will use to contact people, the ways in which particular networks (of, for example, trade unions at local, regional, national, sectoral or European levels) will be used, and how you will keep key stakeholders informed of the project's progress.

— Set out clearly how the consortium intends to sustain the results of the project beyond the project period. Could the results be transferred to other sectors, organisational contexts or target groups? If so, what additional resources might be needed and how might they be secured?

Be prepared

The planning that we have outlined above will take some time - and will itself need some careful planning. For a major project, it will be almost impossible to undertake this in the period between the formal launch of the Call for Proposals and the deadline for applications. However, you do not need to wait for the Call itself. The main parameters of the LLP are clear and, if you are interested in making an application, you should begin your preparation as soon as possible.

Be aware, though, that this investment of time and resources carries both an element of risk, since funding at this stage is not guaranteed, and a real cost, since none of the expenses incurred before the project start date can be included in the project budget. With a carefully planned proposal, however, a strong partnership and the prospect of achieving a beneficial result, the investment can bring significant returns.

Notice that, although this chapter has focused on preparing a project, we have not yet begun to look in detail at the application forms themselves. In our view, this is something that should come later, when your plan for the project is at a fairly advanced stage. We will move on to that in the next chapter.

Chapter 9

Preparing an application

In this chapter we will look at the process of preparing and submitting an application for funding to the Lifelong Learning Programme. We will examine, in particular, the 2009 application form for Multilateral Projects, Networks, Accompanying Measures and Studies in the sectoral sub-programmes, Transversal Programme and Jean Monnet. Although it will touch on some financial aspects, this chapter will not deal in detail with preparing a budget. That will be the subject of Chapter 10.

Laying the groundwork

It is important to remember some of the key points that we touched on in the previous chapter:

— **Preparing a successful project application takes time**. The time needed will vary according to the type of action and complexity of the project. Whilst it may be possible to undertake the planning and gather all the information for an application for a Preparatory Visit in the period between the announcement of the Call and the deadline for applications, the groundwork for a Multilateral Project or a Network will almost certainly need to be well advanced before the Call for Proposals is launched.

— **Preparing the project needs to be a team effort.** Although the heaviest burden will fall on the organisation that is presenting the project, the preparation process should involve all the partner organisations, as they will all need to understand and agree to their respective roles in the project. They will also need to supply information for the budget and provide documentation to form part of the Application Package. Involve them in the process from an early stage.

— **Start by preparing your own project description, not by filling in the forms**. Look back to the previous chapter and/or read through Chapter 5 of Trade Unions and Transnational Projects. Then set out your proposal in your own terms and in as much detail as possible. Consider the needs that you will be addressing; the target group(s) that your project concerns; the LLP objectives and priorities it contributes to; the impact it is likely to have and how you will achieve this. Describe in as much detail as possible the various activities it will entail and how you and your partners will implement and manage them. This will provide you with a sound basis for approaching the application form itself and also for preparing the budget for your project.

Navigating the documentation

We have seen in Chapter 3 that the LLP is a programme with a complex structure and a large number of different activities. It is perhaps, then, not surprising that there is a complex set of documents to describe and manage the programme. In preparing an application, you need to familiarise yourself with all of these.

General Programme documents

These are documents which relate to the LLP as a whole. They are to be found on the DG Education and Culture website (and can also be accessed by links from the EACEA website). Although there are unlikely to be major changes to many of the documents during the lifetime of the programme, most are revised annually. It is important to ensure that you have copies of the most recent versions relating to the particular Call for Proposals that you are interested in:

— The Decision of the European Parliament and Council establishing the Lifelong Learning Programme[93]. This sets out the overall structure, objectives, actions and funding of the LLP.

— Lifelong Learning Programme (LLP) – Call for proposals 2009[94]. This was published on 8 October 2008 and sets out the eligible applicants, budget and application deadlines for the 2009 Call. It was followed by an Addendum in February 2009, setting out the terms of participation for Croatia and the former Yugoslav Republic of Macedonia.

— The Lifelong Learning Programme (LLP) Guide 2009. The 2009 version of the *Guide* is downloadable from the DG Education and Culture website. It takes the form of three separate documents:

    – Part I: General Provisions[95] provides an overview of the LLP and includes information on the submission and selection process and on the requirements for dissemination and exploitation. It also includes detailed information on financial rules and regulations.

    – Part II: Sub-Programmes and Actions[96] sets out details of each of the sub-programmes, providing information on their Specific and Operational Objectives, who can participate and what kinds of activity are supported.

    – Part II: Explanations by Action[97] takes the form of a series of separate information sheets, one for each individual action. These provide more detailed information on the nature of the activity supported, detailed eligibility criteria, application procedures, partnership requirements, maximum duration and grant available,

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[93] See http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_327/l_32720061124en00450068.pdf.
[94] See http://eur-lex.europa.eu/lex/LexUriServ/L exUriServ.do?uri=OJ:C:2008:255:0006:0007:EN:PDF and http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:035:0018:0019:EN:PDF.
[95] See http://ec.europa.eu/education/llp/doc/call09/part1_en.pdf.
[96] See http://ec.europa.eu/education/llp/doc/call09/part2_en.pdf.
[97] See http://ec.europa.eu/education/llp/doc/call09/fiches_en.pdf.

as well as the Award Criteria against which the quality of the application will be assessed.

— General Call for Proposals 2008-10: Update 2009 – Strategic Priorities[98]. This sets out the Strategic Priorities defined by the EU for each of the programmes for the current Call for Proposals.

Read all the documentation carefully. Look at the websites of the LLP itself, of the EACEA and of your National Agency for any updates of information or new documentation. Look particularly at the Frequently Asked Questions (FAQs) pages of both the DG Education and Culture and the EACEA websites[99]. If you were not able to attend one of the Commission's Infodays on the programme, you will still be able to find useful information in the published presentations[100].

National Priorities

Chapter 3 drew attention to the difference between centralised actions, where application is made directly to the European Commission (or more precisely to the EACEA), and decentralised actions (mainly Mobility, Partnership and Leonardo da Vinci Transfer of Innovation actions) where application is made to National Agencies. For these decentralised actions, individual Member States are likely to define **additional national priorities**, which applications need to address. If your project involves one of these decentralised actions, you will need to contact the relevant National Agency and/or visit their website to obtain more information on these national priorities[101].

Application Forms and Instructions

These will change from Call to Call and from year to year. Here again we need to distinguish between applications forms for centralised and decentralised actions.

— **Centralised actions**

With the exception of certain aspects of the Jean Monnet programme, all actions handled under the centralised procedure – Multilateral Projects, Networks, Accompanying Measures and Comparative Research - share a common set of application forms and a common submission procedure with two separate Phases.

The Application Package for Phase I of the process comprises five separate elements:

– Application form: this takes the form of an **eForm**, an interactive Adobe PDF document, to be downloaded, completed on your own computer and then submitted online. This is available from:

http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/llp_form_2009_1_05_en.pdf

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[98] See http://ec.europa.eu/education/programmes/llp/call08/prior_en.pdf.
[99] See http://ec.europa.eu/education/llp/doc1270_en.htm and
http://eacea.ec.europa.eu/llp/funding/2009/call_lifelong_learning_2009.htm#faq.
[100] See http://eacea.ec.europa.eu/llp/infoday09/infoday_2009_en.htm for the presentations and videos from the January 2009 Infodays.
[101] You will find contact details for the National Agencies in Appendix 1.

- Detailed financial tables and Workpackages summary chart: this is available as two MS Excel workbooks, one for consortia of up to 22 partner organisations and the other for consortia with up to 200 partner organisations. We shall look at Part 2 of the application package in the next chapter on the budget. These forms, to be submitted as attachments to the eForm, are downloadable from:

  http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/llp_budget_tables_2009_22p_en_v2.xls.xls

  http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/llp_budget_tables_2009_200p_en_v2.xls.xls

- Declaration of Honour by Legal Representative of Applicant Organisation: this is a Word document, to be completed, signed, scanned and attached to the eForm. Downloadable from:

  http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/dec_hon_2009_fin_en.doc

- Legal Entity Form: to be completed, signed, scanned and attached to the eForm. Downloadable from:

  http://ec.europa.eu/budget/execution/legal_entities_en.htm#en_es_fr

- List of Associated Partners: this is to be submitted only if your project includes Associated Partners (organisations who are participating in the project at their own expense without receiving funding). Downloadable from

  http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/list_of_associated_partners.xls

To support the application process, the following documents are also available:

- Instructions for completing the application form and financial tables: this contains instructions for submission, details of the assessment procedure (including Award Criteria and scoring mechanisms), detailed advice on completing the various parts of the application form and budget tables, and a list of the maximum subsistence rates allowable. Downloadable from:

  http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/instructions_2009_mod_v2_en.pdf

- eForm User Guide: detailed guidance on working with the eForm, including a section by section walk-through of the application form and instructions for attaching documents and validating and submitting the eForm.

  http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/llp_eForm_2009_user_guide_en.pdf

- Frequently Asked Questions (FAQ): this includes a large number of technical queries and responses concerning the eForm.

  http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/faq_v6_20090326.pdf

Following an assessment of the Phase I application documentation, those applicants whose proposals have satisfied the selection criteria and been shortlisted as eligible for co-financing will be notified and required to complete Phase II of the application process. They will need to submit the following documentation within 10 working days of the notification[102]:

– Letter of Intent: separate signed copies from each partner organisation, stating its agreement to participate according to the project plan and budget and to make available the key staff.

– Financial Identification Form: to be completed by the applicant organisation

– Financial Capacity Form: to be completed by the applicant organisation.

In addition, the applicant organisation must submit copies of its Statutes, together with Profit and Loss Statements for the previous 2 years.

Please note that a notification to submit the Phase II documents does not mean that your application will automatically receive funding.

— **Decentralised actions**

The application procedures and the forms for the decentralised actions are controlled by the individual National Agencies. Although the key information required for a particular action is similar in all countries, there are national variations in the detail and structure of the application forms and the application procedure. If you are contemplating a project in the form of one of the decentralised actions, you will need to contact the appropriate National Agency in your country to obtain detailed instructions on how to apply.

It is the Commission's intention to use online electronic forms (eForms) for all applications in the future, including the decentralised actions, many of which already use some form of online submission.

Writing an application

Given the wide range of different activities and application forms within the LLP, this section can only provide some **general advice** on the process of writing an application. Here are some key points to consider:

— Familiarise yourself fully with the background documents and the application form itself before you start to complete it, as well as with the key elements of the policy context.

— Also look at any more general documents on the aspects of the programme that you are interested in. For instance, the presentations

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[102] You will find copies of these documents on the EACEA website at:
http://eacea.ec.europa.eu/llp/funding/2009/call_lifelong_learning_2009.htm#phase2.

from the Commission's Infodays contain helpful pointers on the strengths and weaknesses of previous applications[103].

— Make sure that you and your partners, and the project itself, meet all the eligibility criteria.

— All of the applications must be produced by computer. Handwritten or typed responses are not allowed. If the activity you are applying for has an online application process, see if it is possible to download an offline version of the form to enable you to prepare your answers more conveniently. You can then go back to the online form for the final version. Be sure to print out a copy for your own records before you finally submit it.

— Make sure that you have completed every question and filled in every box with the appropriate response.

— Answer all of the free text questions as straightforwardly and directly as possible. In many sections of the application forms there will be strict limits on the number of words/characters permissible. It is important that you write clearly and concisely, so that you can make all the relevant points whilst still respecting the limits.

— It is likely that your partners will need to complete some sections of the application form and/or that they will need to provide letters of intent. Make sure that they are alerted in good time to provide the necessary information or to obtain the appropriate signatures.

— Do not include in your application further supporting documentation additional to the official application forms, unless you are specifically requested to do so.

— Explain precisely how the project will help meet the LLP's Objectives and Priorities. A mere assertion that it will do so is not necessarily convincing.

— Try to put yourself in the shoes of the people who are going to assess your application. Does it present a clear enough picture of what you are trying to achieve and why? Will it look like an attractive proposition to them? What can you do to improve its 'selling quality'?

— Finally, before you package up the application forms, check them thoroughly. Make sure you have any necessary annexes and accompanying documents and that they are all signed, dated and stamped appropriately.

When you are writing your proposal, be aware of the things that the assessors are most likely to take into account. There are **Award Criteria** related to each of the actions in each sub-programme. In the case of the centralised applications for Multilateral Projects, Networks, Studies and Comparative Research & Accompanying Measures, managed by the Commission and the EACEA, there are eight common criteria, each of which will be assessed on a scale from 0 to 5 points:

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[103] The presentations from the January 2009 Info Days are available at:
http://eacea.ec.europa.eu/llp/infoday09/infoday_2009_en.htm.

Criterion	Maximum score	Threshold score
1. Relevance	5	2
2. Quality of the work programme	5	2
3. Innovative character	5	2
4. Quality of the consortium	5	2
5. European added value	5	2
6. The cost-benefit ratio	5	2
7. Impact	5	2
8. Quality of the Valorisation Plan (Dissemination and exploitation of results)	5	2
Total score	40	16

Each of the criteria is accompanied by a non-exhaustive list of key points to be considered by the assessors, which differ according to the specific action and sub-programme. A summary of these is included in each of the action sheets in the Lifelong Learning Programme (LLP) Guide 2009: Part II – Explanations by Action, with a fuller version being provided in Section 1.6.2 of the Instructions for Completing the Application Form and Financial Tables[104]. An application which fails to achieve the threshold score on any one of the criteria will be excluded from further consideration, irrespective of its overall score.

Let us now look at the most complex of the application forms in detail.

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[104] See http://ec.europa.eu/education/llp/doc/call09/part2_en.pdf and
http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/instructions_2009_mod_v2_en.pdf.

Application form 2009: Multilateral Projects, Networks, Accompanying Measures and Comparative Research

This generic application form is used in the 2009 Call by all the centralised actions within the Comenius, Erasmus, Leonardo da Vinci and Grundtvig sub-programmes, and the Transversal Programme. It forms Part 1 of the Application Package and can be downloaded from the EACEA website[105].

The eForm

The application form is an interactive PDF form that uses Adobe's Acrobat Reader software. You will need to have installed on your computer version 8.1.3 or higher of Adobe Acrobat Reader. This is available free of charge from Adobe's website[106], although you may need to clear installation with your IT department.

Once you have the Acrobat Reader installed, you can download and work on the LLP application form offline on your own computer. You can save your work and later continue or edit it. You will need to be online and connected to the Internet, however, to submit your completed version.

The eForm includes various drop-down lists for you to select from. It also automatically copies various data from one section of the form to another, performs mathematical calculations and has several built-in self-checking mechanisms. Certain fields are mandatory. If they are not completed, you will not be able to validate and submit the form.

The *eForm User Guide* provides detailed instructions on working with the form and you can also download a test version of the form on which to practice[107].

Structure of the Application Form

The application form is organised in six sections:

— Part A: Identification of the applicant and other organisations participating in the project

— Part B: Organisation and activities

— Part C: Description of the project

— Part D: Technical Capacity

— Part E: Project implementation/Award criteria

— Part F: Workplan in workpackages

We have included a copy of the eForm in Appendix 2 (although without its interactive features, the options available under many of the fields are not

[105] See http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/llp_form_2009_1_05_en.pdf.
[106] http://www.adobe.com. There is also a link from the EACEA website at http://eacea.ec.europa.eu/llp/funding/2009/call_lifelong_learning_2009.htm#PhaseI.
[107] See http://eacea.ec.europa.eu/llp/funding/2009/documents/call_llp/testform_1_01_en.pdf.

apparent). Although, the document Instructions for Completing the Application Forms and the Financial Tables provides detailed assistance on completing the form, section by section, we thought it would be useful to draw attention here to various points:

— The Application Form and the Detailed financial tables are closely related and it is not possible fully to complete one without reference to the other. However, in this Handbook we have chosen to deal with the financial information in a separate chapter[108.] It is essential, however, that the information provided in the budget forms and the information provided in the eForm are absolutely consistent. You may find it best to start by drafting a response to those sections of the Application Form that do not depend on budgetary information. Next complete the financial tables and finally return to the Application Form to review the draft and to incorporate information from the detailed budget.

— A substantial part of the Application Form requires the provision of factual information, ticking of checkboxes and selecting information from drop-down lists. These elements of the form are likely to be fairly straightforward to complete. More challenging will be the presentation of information about the project itself and its justification, as this is where your application can score highly with the assessors.

— Note that, although the applicant organisation is responsible for drawing up and submitting the application and is likely to complete the bulk of the application form itself, each participating organisation needs to complete Parts B and D.

— Although the applicant organisation is likely to write the major part of the text of the application, there may well be other useful contributions that partners could make, referring to their own national contexts, as well as perhaps to studies or reports indicating particular needs. This could be a particular advantage in providing assessors with evidence of both in-depth research and strong team collaboration.

— The eForm automatically generates the summary lists of Partner Organisations (following Part B), Deliverables (C.2) and Workpackages (C.7) from data entered elsewhere in the form. It similarly synchronises and automatically transfers data to fields in sections D.1, F.3 and F.4.

— Many of the free text fields will accept only a limited number of characters, with the largest allowing no more than 2,000. To produce a convincing application, you will need to write succinctly, providing clear explanations and emphasising key points. The eForm does not allow any formatting of text (e.g. boldfacing, bulleted lists).

Cover page

— Choose a title for you project which gives an idea of the content of your project. Try to find something concise but memorable, which both relates to the LLP objectives and keywords and gives a flavour of the issue you are addressing or the results you are trying to achieve.

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[108] See Chapter 10.

Depending on the nature of the project, it might also indicate the target group or the methodology involved.

— You need also to create an acronym for the project. It should be memorable and easily pronounceable and ideally should be something that will resonate with speakers of all your partner languages. Note that the field in the eForm does not allow more than 7 characters.

— You must indicate the language in which you are submitting the application, selecting from the list of official languages in the drop-down list. This should be the main working language of the project and should be understood by all the partner organisations, as they need to understand and sign up to the work programme contained in the application. All sections of the application, with the possible exception of Section C.1, must be completed in this language.

<u>Part A: Identification of the applicant and other organisations</u>

— The LLP recognises 4 categories of organisation:

  – Applicant Organisation: the organisation that is submitting the application and which, if successful, will sign the grant agreement and will be **legally** responsible for the implementation of the project

  – Coordinating Organisation: in the event that the Applicant Organisation is not itself responsible for the **day-to-day management** of the project

  – Partner Organisation: other organisations contributing to the work of the project that are eligible to participate fully in the project and are members of the project consortium. Partner organisations will normally be eligible to receive funding from the project budget.

  – Associated Partners: organisations that will be contributing to the work of the project but are not formally members of the project consortium. These are organisations who are not eligible to receive funding from the project and whose costs may not be included in the project budget.

— Each of the organisations in the consortium is identified by a partner number (P1, P2, P3, etc). These numbers must be used consistently throughout the application. The Applicant Organisation must always be designated as P1, with the Coordinating Organisation, if there is a separate one, being designated as P2.

— If the application is made by a European organisation with member organisations in several European countries (for instance, a European Industry Federation), the member making the application should present itself as the Applicant Organisation, with each of the members acting as Partner Organisations.

— Section A.2 must provide contact details of the person signing the Declaration of Honour and the Legal Indentity Form. They must have the power legally to bind the Applicant Organisation and will be the named signatory of any grant agreement, if the application is successful.

Part B: Organisation and activities

— Each of the organisations should explain clearly the scope of their normal work, what kinds of expertise they have, what products and services they supply and how this relates to the project proposal. This will be an important element in assessing the strength and balance of the consortium.

— Organisations may be partners in several LLP projects. If an organisation is participating in other applications to the LLP **in the current Call for Proposals**, it should provide details of all of these here. The information will be used to check that there are no elements of double-funding.

Part C: Summary of the project

— This is an important part of the form and provides a maximum 2,000 character précis of your project which will be used for official publications. For this reason, **it must be provided in English, French or German, even if the rest of the application is presented in another language**.

— This brief summary should include an explanation of the reason for the project, what it is setting out to accomplish, a description of any products and of the key outcomes and results, as well as of the impact that you hope to achieve. You might find it helpful to look at some of the summaries of previously funded projects to get an idea of the style[109]. You need to feel confident that this is a succinct and well-polished statement that truly captures the essence of your application.

— Section C.3 requires you to situate your project in relation to the Objectives and Strategic Priorities of the LLP. Your project must address at least one of the Specific Objectives of the overall Programme and at least one of the Specific and Operational Objectives of the relevant Sub-programme or Key Activity. Note that if you select one of the Objectives, it is essential that you enter a justification setting out of the ways in which your project addresses this; the eForm will not allow you to leave this field blank. It is advisable to select a small number of Objectives for which you can provide clear and convincing justifications, rather than make a larger selection with less robust defence.

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[109] See, for example, the Leonardo da Vinci and Grundtvig compendia of successful projects from the previous Calls for proposals at: http://eacea.ec.europa.eu/llp/general_information/leonardo_da_vinci_en.htm#links and http://eacea.ec.europa.eu/llp/grundvig/grundvig_en.htm. Similar compendia exist for other parts of the LLP.

— You will not be able to complete Section C.5 of the form until you have produced a final version of the Detailed financial tables and Workpackages summary chart[110]. You need to ensure that the figures entered here are identical to those found in Row 9 of the worksheet Expenditure & Revenue.

— Note that, in the case of a discrepancy between the figures quoted, those contained in the Application Form will take precedence.

— Sometimes projects may build on the results of earlier projects or may be closely related to one or more other applications on a similar topic. If this is the case, you need to provide details in Section C.9.

Part D: Technical Capacity

— Each organisation will need to enter details of all key staff and their specific areas of relevant expertise. This will be used to judge the strength of the project consortium.

— Any tasks that are to be sub-contracted outside the project consortium also need to be specified here.

Part E: Project implementation/Award criteria

— This section of the form is of crucial importance and will provide the basis for much of the assessment of the application. Answers will be judged against the Award Criteria noted earlier in this chapter. In each case, write clearly and succinctly, as each answer has a maximum length which cannot be exceeded. Above all, make sure that you directly answer the questions posed and present information which is relevant and sufficient to provide a clear view of how your project responds to these criteria. Mere assertions that it does will not suffice.

— Innovation is an important criterion in considering all of the centralised actions, although the kind of innovation and its scope is likely to vary considerably between projects and networks, accompanying measures and studies and comparative research. The degree of innovation may be difficult to define and measure but you must be able to demonstrate that your proposal will bring added value by creating new solutions, offering fresh opportunities, developing new skills, collecting new evidence that will underpin new policies or making information available to broader communities in more effective ways. Remember that partner organisations may have useful information to offer here with reference to the situation in their own countries, sectors and organisations. They may also be able to provide references to particular studies or reports which could help justify the innovative nature of your proposal.

— Outline the background to the consortium, how and why the various partners have come together and what contribution each will make. Describe the areas of particular expertise that they bring. Refer to the Management workpackage and make sure you have provided information on how the project will be managed and how the partnership will operate in practice.

— In terms of European added value, explain why this initiative could not have been undertaken as a national project and what additional benefits the cooperation at European level will bring.

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[110] See Chapter 10.

Part F: Workplan in workpackages

— This section collects detailed information on the workpackages and deliverables. You will need to create additional sheets, one for each workpackage.

— The eForm identifies 5 types of workpackage:

  – Management

  – Dissemination

  – Exploitation

  – Quality Plan

  – Development

— Note that whilst the Lifelong Learning Programme (LLP) Guide 2009: Part I[111] discusses dissemination and exploitation as closely related aspects of a common process of 'valorisation', the Application Form places these in quite distinct types of workpackage. It is worth looking back at Chapter 8 and studying Section 5 of the Guide to make sure you understand clearly the focus of each workpackage.

— The Quality Plan (Quality Assurance) workpackage type should deal with activities concerned with both formative and summative evaluation.

— The Development type of workpackage covers the substantive, central productive activities of the project (developing and running courses, producing materials, organising conferences, conducting studies, for example).

— Your project **must include at least ONE workpackage** of each type to be eligible for consideration. (It will probably contain several Development workpackages, covering different elements of the main activities of the project.)

— Describe the work involved in each workpackage and how it will be organised, managed and monitored. Note the key milestones and mention any specific methodologies or techniques that will be employed. Indicate how the work involved is dependent on, or feeds into, other workpackages. Outline how the work in progress and its achievements will be monitored and identify the key performance indicators. These should be clearly related to the objectives you have set out. For more advice on evaluation and on performance indicators, please refer to Chapter 6 of Trade Unions and Transnational Projects.

— Identify the outputs, products and results of each workpackage. These may include, amongst other things: web sites, conferences, seminars, training modules and courses, reports, handbooks, manuals, training materials, CDs, DVDs, curricula, brochures, posters and other publicity material.

— Every workpackage must produce at least one deliverable. A single workpackage may produce several deliverables. If so, you will need to copy this sub-section of the form to accommodate them all.

— Each workpackage requires an identified Lead Partner who will be responsible for coordinating and overseeing its delivery. Try to ensure that there is an appropriate balance of work between the various partners and between different nationalities within the partnership.

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[111] See http://ec.europa.eu/education/llp/doc/call09/part1_en.pdf.

— Section F.4 requires information about the staffing resources need for each workpackage and a note of tasks to be sub-contracted. It also asks for an explanation and justification of other costs related to the workpackage. This information again needs to be consistent with the information in the Detailed financial tables.

— Attachments.

— As noted previously, before you validate and submit the eForm, you need to attach the Declaration of Honour, the Detailed Financial Tables and the Legal Identity Form, as well as the List of Associated Partners, if appropriate.

Submitting the application

— Make sure that you adhere to the published deadline for submission, as published in the Call for Proposals and also noted in section 1.5 of the Instructions for Completing the Application Forms and the Financial Tables.

— You need to provide:

- **One original copy** of the Application Package (Application Form, Detailed financial tables, Declaration of Honour, Legal Identity Form and, if appropriate, List of Associated Partners – i.e. the eForm with the others as attachments) to be submitted **electronically.** This is considered as the master copy.

- **One electronic version** of the complete Application Package which must be sent by e-mail to the following address: eacea-llp@cec.europa.eu

- **One hard copy** of the complete Application Package, printed and sent by surface mail, addressed as follows:

  LLP Call 2009 – [NAME OF ACTION]
  Education Audiovisual & Culture Executive Agency
  Avenue du Bourget 1
  BOUR- Lifelong Learning Programme Collection Point
  BE-1140 Brussels

For [NAME OF ACTION] should be substituted **one** of the following:

COMENIUS
ERASMUS
LEONARDO DA VINCI
GRUNTDVIG
Key Activity 1 (Studies and Comparative Research)
Key Activity 2 (Languages)
Key Activity 3 (ICT)
Key Activity 4 (Dissemination and exploitation of results).

It is recommended that you send the Application Package by Registered Mail and that you keep a receipt, showing the address and date of postage. Keep a copy of the e-mail, too. Please note that the date and time of posting must not be later than the final deadline of the Call for Proposals, otherwise the application will be disqualified.

Application forms for the decentralised actions

As we noted earlier, the application procedures and the forms for the decentralised actions are controlled by the individual National Agencies. For this reason there is likely to be some variation in the individual national forms. Although the basic information collected, for example, in an application for a Leonardo da Vinci mobility project in France is similar to that in an application made in Ireland, there are likely to be different national priorities, different funding regimes and the structure of the application form is likely to differ. For instance, several National Agencies, including France and the UK, have online application procedures for certain activities.

These decentralised actions can take a variety of different forms, including most particularly:

— Preparatory visits

— Study visits

— Exchanges

— In-service training

— Bilateral and multilateral partnerships

— Leonardo da Vinci Transfer of Innovation Projects.

Given this range of activity and the variation in national forms and procedures, it is impossible to provide the detailed guidance here that we have given in the case of the generic form for centralised actions. If, then, you are contemplating a project in the form of one of the decentralised actions, you will need to contact the appropriate National Agency in your country to obtain instructions on how to apply[112]. The quality and sophistication of the National Agency web sites also vary considerably, but many of them have excellent support documents on different aspects of the LLP, as well as case studies of successful projects. The National Agencies will also provide direct advice and guidance on your application by phone or e-mail.

Despite the variation in the detail of different application forms, all are likely to require some common elements of information:

— Information about the specific sub-programme concerned and the Objectives and Priorities addressed

— Information about the target group concerned and the needs addressed

— Information about the applicant/applicant organisation, coordinating organisation, and partners

— Information about the project itself, including an outline of the activities involved and their duration, an explanation of how they will achieve the stated objectives and a description of the results they are expected to achieve

— Information, where appropriate, about the innovative aspects of the project

— Information about the anticipated impact that the project will have and a plan to maximise the dissemination and exploitation of its results

— Information about the organisation and management of the project

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[112] For details of National Agencies, see Appendix 1.

— Information about the relation of the project to any previous projects and to any previous EU funding

— Information about the funding requested, either as a detailed budget or as a summary figure derived from a separate budget form

— A Declaration of Honour, signed by a legal representative of the applicant organisation.

In general terms, an application for a Transfer of Innovation Project is likely to have many similarities with the form for centralised actions that we have examined in this Chapter. Application forms for the various Mobility awards will generally be much simpler.

Your National Agency will advise you on the appropriate form to use for your application and will also answer questions about how it should be completed. It will advise you how best to formulate your project idea so that it meets the criteria of the Call and can also help you in a search for partners, as well as possibly awarding funding for a Preparatory Visit.

In this chapter we have looked in some detail at the process of completing an application form and submitting an application for a centralised action. The comments here and the process that we have worked through should also stand you in good stead in approaching applications for other types of action. In the next chapter we shall look in similar detail at the financial regulations and at how to complete a budget form.

Chapter 10

Preparing a budget

In this chapter we will look at the financial aspects of the project. The chapter starts with a presentation of the general financial regulations governing the Lifelong Learning Programme. It then looks in detail at the common Detailed financial tables and Workpackage summary chart for Multilateral Projects, Networks, Accompanying Measures, Studies and Comparative Research, as well as considering the budget forms for mobility actions.

Introduction to budgeting

Calculating the budget is an important task and is closely related to the project description. The more detailed the project description and work breakdown that you produce, the easier you will find it to prepare an accurate budget.

A budget contains an estimate of the cost of the project and the income streams that are going to resource these costs. The expenditure and the income sides of the budget need to balance exactly, as the LLP financial regime is one of grant funding and does not allow any profit to accrue.

As well as a balance of income and expenditure, the budget must present a detailed breakdown of the costs for the various activities within the project, detailing the various categories of cost (staffing, travel, subsistence, etc) by partner organisation. The actual budget structure and the amount of detail required vary between different sub-programmes and types of action.

Some of the LLP budget forms are structured as Microsoft Excel workbooks; others are more simple tables within text documents. Whatever the form in which you need to present the budget information within the final application package, you will find it useful to develop it initially as a spreadsheet, using a program such as Excel. This will help you with the calculations and will also enable you to work with a more detailed breakdown of tasks and costs than the budget form itself may allow. You can then sub-total your more detailed information and copy it to the budget forms.

A budget can only ever be an estimate; actual costs will almost certainly vary. However, the more care you put into constructing the budget, the better the estimate is likely to be. You will also be able to present the assessors with a more detailed and robust justification for your figures. If the project is approved, you will then have a valuable tool to help you monitor and control the finances of the project.

General financial regulations

The financial regulations applicable to the different types of action within the LLP vary. There are, however, certain common factors.

Co-financing

— In general, grant applications are required to show an element of co-financing, either from partner organisations' own resources or from third parties, which could include other national funding agencies. Any income generated by the project itself (fees for courses and conferences, sales of products, bank interest, etc) must also contribute to financing the project.

— Co-financing must be made in the form of a **cash contribution** and may no longer include any '**in-kind**' element. A cash contribution is defined quite broadly as 'a financial flow that can be traced in the written accounts of the promoter, the partners or third parties'. This means that the staffing costs of people employed by partner organisations are acceptable as a cash contribution, as long as they are supported by time sheets and salary documents. Equally, if a third party contributes the cost of renting equipment or rooms, this is acceptable, as long as they have incurred a real additional cost and can provide the documentation to support it. What is crucial in each case is that:

  – A real cost must be incurred.

  – There must be appropriate documentation in the form of invoices, receipts, travel tickets, time sheets or bank statements.

  – These must be recorded in the formal accounting systems of the partner organisations.

— In the LLP, the calculation of grant funding takes a variety of forms, dependent on the specific action. In some actions, such as Multilateral Projects, it is based on the reimbursement of a **percentage of the actual eligible costs** incurred in realising the project. In others, such as Mobility actions, it is calculated according to a **fixed scale of unit contributions** (for example, *x* days at *y* rate), or takes the form of a **flat-rate grant** or fixed sum, irrespective of the actual cost. An element of co-financing has already been taken into account in the calculation of these last two contributions. Flat rate grants and those based on scales of unit contributions are clearly much simpler to calculate and to manage than those based on a percentage of actual costs. For the former, no documentation is required to justify the actual expenditure incurred; the beneficiary must instead provide evidence that the planned activity has taken place and has involved the requisite number of participants for the agreed duration.

Eligible costs

— Eligible costs must satisfy the following criteria:

  – They must relate to activities involving the eligible countries in the Call[113]. Any costs relating to activities undertaken outside these countries or by organisations that are not registered in an eligible country are not eligible

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[113] See Chapter 3.

unless they are necessary for the completion of the action and duly justified in the application form and in the project report.

– They must be incurred by legal bodies/institutions or by natural persons, according to the action concerned.

– They must be directly relevant to the proposal and workplan.

– They must be essential for the performance of the action.

– They must be reasonable and justified and must accord with the principles of sound financial management, in particular in terms of value for money and cost-effectiveness.

– They must be generated during the lifetime of the project.

– They must be actually incurred by the beneficiary and be recorded in its accounts in accordance with applicable accounting principles and be declared in accordance with the applicable tax and social legislation.

– They must be identifiable and verifiable. This means that they must be supported by appropriated documents: invoices, receipts, staff time sheets and attendance lists at events.

— In the case of Multilateral Projects, Networks, Accompanying Measures, Studies and Comparative Research and Jean Monnet Projects, a distinction is made between:

– **Eligible direct costs**: these are costs which can be separately identified as specific costs relating to the performance of the project activity.

– **Eligible indirect costs**: these are costs which have contributed to the performance of the activity but which it is difficult to identify separately. They are what are commonly known as 'overhead costs', relating, for example, to the costs of infrastructure, administration and communication. For these projects, eligible indirect costs are calculated as a percentage – up to a maximum of 7% - of the total eligible direct costs of the project.

— All costs in the budget must be shown in **Euros**. Applicants from outside the Euro zone must use the conversion rates published in the Official Journal of the European Union (Series C) on the date of the publication of the Call for Proposals[114].

— Costs must be shown net of any **VAT element**, unless the applicant can show that it is not VAT-registered and cannot recover these costs. This is likely to be the case for many trade unions who should therefore enter the full cost of items (including VAT).

Non-eligible costs

— **The application budget must not include provision for any of the following**:

– Return on capital

– Debt and debt service charges

– Provisions for losses or potential future liabilities

– Interest owed

– Doubtful debts

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[114] You can find copies of the Official Journal at http://eur-lex.europa.eu/JOIndex.do?ihmlang=en.

- Exchange losses

- VAT (but see note above)

- Costs covered by another action or work programme receiving a Community grant

- Excessive or reckless expenditure

- Purchase of capital assets, including the cost of any buy-out option at the end of a lease or rental period

- Costs of opening and operating bank accounts

- Costs associated with the preparation of the application to the Lifelong Learning Programme, including costs incurred in relation to any document required to be submitted with the application (audit reports, etc.).

Financial regulations for specific actions

You will find a detailed statement of the general financial framework for the LLP in Section 4 of the Lifelong Learning Programme (LLP) Guide 2009: Part I – General Provisions, downloadable from the DG Education and Culture web site[115]. This sets out financial regulations concerning the various actions and sub-programmes, as well as providing current tables of flat-rate grants and scales of unit contributions for Mobility actions and Partnerships. We will look briefly here at some of the additional conditions that apply to specific actions:

Mobility Actions

— For all mobility actions, the contribution to subsistence costs is calculated on the basis of daily, weekly or monthly unit rates, published in Sections 4.C and 4.D of the Guide 2009: Part I. Subsistence costs cover accommodation, meals, local travel, the cost of telecommunications, including fax and Internet, and all other sundries.

— For those actions lasting up to and including 12 weeks, travel costs are awarded in addition to the subsistence costs. The travel element of grants will be based on the actual costs incurred (including any costs for entry/exit visas) and will be reimbursed either in total or in part only (by applying a ceiling or a maximum covering percentage), as determined by the individual National Agency.

— For mobility actions of more than 12 weeks duration, the grant awarded for subsistence is a global flat-rate contribution to cover all costs, including travel costs.

— However, if individuals reside in one of the overseas countries and territories listed in the Decision establishing the LLP or have one of those territories as their destination, the actual costs of travel will be reimbursed in full, irrespective of the duration of the mobility action.

— Mobility actions may also include a category of Other Costs, associated with, for example, preparation activities (including, in many cases, language preparation activities to help participants improve their communication

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abilities in a foreign language), management costs or seminar fees. How these are reimbursed varies according to the particular sub-programme.

— Note that the National Agencies are allowed either to establish a co-financing percentage for mobility actions or to reduce the amounts of support listed in the rate tables published in the Call documents. In every instance you should check with your National Agency concerning the local arrangements.

Partnerships

— Partnerships are financed by a lump sum grant to each partner, as a contribution to cover all eligible partnership costs: travel, subsistence during mobility periods and local project activities. The precise amount varies according to sub-programme and the scale of the partnership activities. See Section 4.E of the Guide 2009: Part I for full details.

Multilateral Projects, Networks, Accompanying Measures, Studies and Comparative Research and Jean Monnet Projects

— The budget for these actions requires a detailed estimate of the costs envisaged, of which the Commission grant will not cover more than 75%.

— **Staff costs** are based on real daily rates. However, the Commission has determined **maximum permissible rates** for different categories of staff in each country. See Section 4.F of the Guide 2009: Part I for full details. Any amount in excess of the maximum rate is considered ineligible and will not be taken into account in establishing the eligible cost of the project. The application of the rates is determined by the country in which the partner organisation is registered, irrespective of where particular activities may take place.

— **Staff costs** should include the costs of all staff directly engaged on temporary or permanent contracts of employment with one of the partner organisations and who are working on the project. It should also include temporary staff recruited by one of the partners through a specialised external agency. All other staff should be treated as sub-contracted. All or part of the staff costs of a partner organisation (as well as any sub-contracted costs) may be counted as a 'cash contribution' for co-financing purposes, to the extent that they can be verified and are not recouped from the Community grant.

— **Daily staff rates** are based on actual gross annual salary plus social costs (including pension contributions), but exclusive of any bonus, car allowance, expenses or profit-sharing scheme. To calculate a daily rate, the annual cost should be divided by the average number of days worked in a normal year. This may vary from country to country and organisation to organisation but would not normally exceed 220 days.

— Reimbursement of **travel costs** is based on the actual costs incurred and should include all associated costs, including visas and insurance. Journeys should make use of the most direct and economical means of travel, taking advantage of any reduced fares, and may include rail, bus, taxi, plane and car travel.

– Private car: reimbursement may be claimed on the cheaper of the equivalent plane, bus or rail fare for the same journey for one person or at a rate of not more than €0.22 per km.

- Hire car or taxi: is acceptable if the need is unavoidable and if the cost is not excessive in comparison with other means of transport.

— Costs of any **local travel**, once the point of principal destination has been reached, should not be included as part of Travel Costs. These costs are intended to be covered by subsistence allowances.

— Reimbursement of **subsistence allowances**, to cover accommodation, meals and local travel, is based on the internal rules of the partner organisations, which may be on actual costs (i.e. reimbursement of receipts) or on the basis of a daily allowance. In either case, the partner organisation will need to provide proof of attendance and the daily cost must not exceed the maximum daily subsistence rate allowed for the country in which the costs are actually incurred. Section 3.2 of the Instructions for Completing the Application Form and Financial Tables provides details of these. A pro-rata reduction must be applied for periods of less than a full day and not more than 50% of the daily rate may be claimed if no overnight accommodation is involved.

— Purchase, rental or leasing of **equipment** (either new or second-hand) may be included in the budget, if it is essential to the goals of the project. However, in the case of purchased equipment, only the portion of the equipment's depreciation corresponding to the period and usage of the equipment within the project may be included. Depreciation rates used must be those generally accepted in the country concerned. If, for example, this is normally calculated over a 4 year period, then an item of equipment costing €1,000 will depreciate at 25% per annum or €250 per year. If the equipment were to be used within the project during a six month period, the amount allowable would be €250 x 50% i.e. €125. Equipment costs may not form more than 10% of the total direct costs of the project.

— Equipment relating to the administration of the project, rather than to the central substantive activities, together with any equipment purchased before the start of the project, is considered as an indirect cost and therefore nor directly chargeable as an equipment cost.

— Specialist services which are engaged to carry out a part of the project must be the subject of procurement contracts and in many circumstances of formal tender processes. These are classed as **subcontracting costs**. They include services provided by self-employed individuals, such as consultants or experts who are not employees of one of the members of the consortium, as well as services provided by private or public enterprises. They also include translation, interpreting and printing services. In each case, the costs involved must represent the total cost for the service, including any staff costs, travel or subsistence. The need for subcontracting must be justified in each case and the total subcontracting costs must not exceed 30% of the total direct costs of the project. The management and general administration of the project may not be subcontracted.

— The following specific Community rules with regard to **procurement** apply:

- Contracts with a value below €12,500 can be paid simply on presentation of an invoice.

- Contracts with a value between €12,500 and €25,000 are subject to a procedure involving at least three tenders.

- Contracts between €25,000 and €60,000 are subject to a procedure involving at least five tenders.

- For contracts of a value over €60,000, national rules with regard to procurement apply.

— **Other costs** that are allowable as part of the eligible direct costs include:

- Costs that do not fall into one of the previous categories and that are concerned with the main substantive activities of the project: for example, costs involved in providing seminars and courses, costs associated with producing information or training materials (whether in printed or electronic form), conference fees and costs of purchasing copyrights and other Intellectual Property Rights

- Costs arising from the requirement of the grant agreement, including dissemination costs, audit costs and the costs of any financial guarantee. (Note that, dependent on the EACEA's examination of the information supplied concerning the applicant's financial capacity, a grant agreement may be offered with an obligation to provide a financial guarantee for pre-financing i.e. a bank guarantee to underwrite the costs of all monies released to the consortium up until the acceptance of the final cost report for the project).

Completing the financial tables for Multilateral Projects, Networks, Accompanying Measures, Studies and Comparative Research

General guidance

Having sketched out most of the basic elements of the LLP's financial framework, let us now turn to look at the budget forms themselves. We will focus our attention principally on the most complex of these, a common form for all the Multilateral Projects (with the exception of the Leonardo da Vinci Transfer of Innovation Projects), Networks, Accompanying Measures, Studies and Comparative Research. Applications for these projects are all handled through the centralised process, administered by the EACEA, and these financial tables, which provide the provisional budget together with an outline Gantt chart, are the counterparts of the application forms we looked at in the previous chapter.

The financial tables take the form of an Excel workbook with several interlinked worksheets. It is available in two versions: one for consortia with up to 22 members, the other for consortia with between 23 and 200 members. Other than the size, there are no significant differences between the two forms and what follows is applicable to each. They are available for download from the EACEA web site[116].

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[116] See http://eacea.ec.europa.eu/llp/funding/2009/call_lifelong_learning_2009.htm#PhaseI.

The Excel workbook contains the following worksheets:

- Sheet 1: Timetable (Gantt chart)
- Sheet 2: Staff
- Sheet 3: Travel and subsistence
- Sheet 4: Equipment
- Sheet 5: Subcontracting
- Sheet 6: Other
- Sheet 7: Expenditure & revenue
- Sheet 8: Ceilings
- Sheet 9: Actions

Sheet 7 is a summary sheet, which to a large extent draws automatically on data entered in Sheets 2-6. Sheets 8 & 9 simply provide information on maximum staffing and subsistence rates and on the various actions to which the form is applicable. They do not require any data entry, nor do they need to be submitted with the application.

Before we look at the forms in detail, here are some **general points** to be aware of:

— Most importantly, as you will understand as we work through the forms, these budget tables do not in themselves contain all the detailed financial information you will need concerning the project. They do not, for example, provide a detailed breakdown of costs by partner, nor do they show the staffing input for each workpackage, which is information that you will require to complete the Application Form. You will therefore need to produce a more detailed working budget from which you can extrapolate the information required. If your project is very simple, you may find it reasonable to calculate this manually. Our advice, however, is to construct a detailed budget as a separate spreadsheet which will allow you to interrogate and manipulate data in a variety of ways.

— You will need to take great care to ensure that the information provided in the *Financial Tables* is absolutely consistent with the information in the Application Form.

— The worksheets contain cells with a grey background, as well as clear/white cells. The grey cells contain formulae and are protected so that they cannot be modified. You must enter data only in the white cells.

— The worksheets also contain certain validation checks, to ensure that the figures that you enter fall within the limits allowable. These concern staffing and subsistence rates, as well as the percentages of indirect costs, subcontracting and equipment. If you exceed these limits, **error messages will appear** and will not disappear until you have entered an amount that is within the limits.

— In Sheets 2-6, when you enter data in one cell in a particular row, an error message will appear in the Total Costs column. This will remain there until all the other cells in the row have been completed, at which point the program will calculate and enter the total sum.

— Sheet 7 will similarly display **ERROR** in various cells, until all the data entered in Sheets 2-6 and in Sheet 7 itself is complete and conforms to the various financial parameters.

— In Sheet 2 (Staff costs) and Sheet 3 (Travel & subsistence) you should first select the **country** from the drop-down list in Column A **before you enter any other data**.

— All figures must be entered in Euros. Only whole numbers are acceptable.

— As Sheet 7 draws largely on information from the other sheets, you should leave completing this until the last.

Sample budget

To help us work through the forms, we have constructed a **sample project** with the following key characteristics:

— A Leonardo da Vinci Multilateral Project – Development of Innovation

— Aim: to develop and test a training module and materials

— Duration: 24 months

— Partners: four organisations based in four different Member States

— Seven workpackages:

Workpackage 1: Management
Workpackage 2: Develop training module and materials
Workpackage 3: Train trainers
Workpackage 4: Deliver pilot training courses
Workpackage 5: Dissemination
Workpackage 6: Exploitation
Workpackage 7: Quality plan

We will start by looking at the first sheet in the workbook.

Sheet 1: Timetable

This is the blank Timetable worksheet:

— You need to enter data for each of the workpackages that you have identified in Section 5 of the Application Form:

– First, select the **Type of Action** from the drop-down menu in the box above the calendar. This will automatically set up the maximum project duration in months and will generate an **ERROR** message, if the workpackage data you insert exceeds this limit.

– Then move to Workpackage 1 and select the **Type of workpackage** from the drop-down menu in Column B.

– Next, insert the Start Month for this workpackage (e.g. 1 = Month 1, 2 = Month 2, where Month 1 is the Start Month for the whole project).

– Then insert the Duration of the workpackage as a number of months. This will automatically fill out the appropriate months on the calendar as a horizontal bar.

– Repeat this process, providing details of the Type, Start Month and Duration for all the workpackages in your project.

— Make sure that the information you provide here is consistent with the information in Section 5 of the Application Form.

Here is a completed Timetable worksheet for our sample project:

As you can see the Timetable sheet is fairly straightforward. Now let us move on to something a little more complicated: staff costs.

Sheet 2: Staff

The illustration below shows the blank worksheet:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
					Staff by category											
					1. Manager			**2. Researcher, teacher and / or**			**3. Technical**			**4. Administrative**		
		Country	Overall total number of working days	Overall total staff costs	Number of working days on the project	Cost per day	Total staff cost by category	Number of working days on the project	Cost per day	Total staff cost by category	Number of working days on the project	Cost per day	Total staff cost by category	Number of working days on the project	Cost per day	Total staff cost by category
1	ESTIMATED staff needs and costs by partner															
2	All figures in Euro															
7	Total working days		0		0			0			0			0		
8	Total staff costs			0			0			0			0			0
9	P1		0	0			0			0			0			0
10	P2		0	0			0			0			0			0
11	P3		0	0			0			0			0			0
12	P4		0	0			0			0			0			0
13	P5		0	0			0			0			0			0
14	P6		0	0			0			0			0			0
15	P7		0	0			0			0			0			0
16	P8		0	0			0			0			0			0
17	P9		0	0			0			0			0			0
18	P10		0	0			0			0			0			0
19	P11		0	0			0			0			0			0
20	P12		0	0			0			0			0			0
21	P13		0	0			0			0			0			0
22	P14		0	0			0			0			0			0
23	P15		0	0			0			0			0			0
24	P16		0	0			0			0			0			0
25	P17		0	0			0			0			0			0
26	P18		0	0			0			0			0			0
27	P19		0	0			0			0			0			0
28	P20		0	0			0			0			0			0

Expenditure & revenue \ Staff / Travel and subsistence / Equipment / Subcontracting /

— This worksheet requires you to provide a breakdown of staffing by partner organisation, allocated to four different categories of staff:

  – 1. Manager

  – 2. Researcher, teacher and/or trainer

  – 3. Technical

  – 4. Administration.

For each partner, you need to start by selecting the appropriate country from the drop-down list in Column B. (If you do not enter the country first, the program will record a zero in the Total columns. This will be corrected as soon as you enter the country code.) You then need to enter the number of days worked on the project for each category of staff, together with a daily cost figure. If the actual daily cost that you have entered exceeds the permitted maximum for the category and country, an error message will appear, advising you that the data is invalid. Refer to Sheet 8: Ceilings, and enter a figure that is within the permitted range. The program will then automatically calculate totals.

— This all seems fairly straightforward. However, it is important to note two points:

  – You must use only one row per partner for data, but a partner organisation may have several staff members within a particular category, contributing different numbers of days and being paid at different rates. If this is the case, then for each partner that this applies to, you will need to calculate separately the total number of days per staff category and the total staff cost for each category, so that you can establish and enter in the worksheet the **average** daily cost for each category.

  – The number of staff days per partner and per category that you enter here must also reconcile with the information provided in Section F.4 of the *Application Form*. *Sheet 2*, however, requires the **total** staffing contribution per category for each partner. It does not allow an analysis by workpackage. There is therefore no possibility of making an easy reconciliation between the two, but rather the distinct possibility of discrepancies arising between the figures in the two documents, unless you are very careful.

— Our advice in Chapter 9 was that you should start from your own project description, before you approach the application forms. We would recommend that you do the same when starting to develop the budget: start by building spreadsheets of your own. These can contain all the detailed information that you require and can help automate and validate some of the calculations required to arrive at the data you need to enter in the Detailed financial tables*.*

— The sort of problem we have encountered in *Sheet 2* occurs in relation to other sheets, as you will see as we progress through the workbook. We do not have the space here to provide detailed instructions on dealing with each one, nor can we provide you with a crash course in using Excel. We will, however, offer a detailed suggestion of how we

would deal with the staff calculations and would refer you as well to the illustrations in the Preparing a budget section of Chapter 5 of Trade Unions and Transnational Projects[117]. Although the structure of the budget forms in the illustrations there is slightly different, the general approach is still applicable here.

— Our recommendation in Chapter 8 was that you should first, at an early stage of the planning, break down the project into tasks and workpackages with clear timeframes, and then allocate the specific resources needed to accomplish the tasks. We suggest that in budgeting the project, you add estimated costs to each of the resources, assembling the information, workpackage by workpackage, until you have a budget which comprises costs for all the elements of all the various tasks. Unless your project is very simple, you will find it easiest to do this using a spreadsheet program. This will allow you to analyse the information in different ways – for example, sometimes by workpackage, sometimes by category of cost, sometimes by partner organisation. If you code each item of information using these parameters, you can employ the powerful facilities of the spreadsheet to sort and sub-total them in a variety of different ways, bearing in mind the requirements of both the Application Form and the Financial Tables.

— You will also find this more detailed breakdown useful when you come to manage the project, as it will allow you to track and monitor partner costs against budget more easily.

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[117] See
http://www.etui.org/education/resources/trade_unions_and_transnational_projects_sixth_edition__1.

This is how we would approach the staffing element:

– First, using Excel or a similar spreadsheet program, we would construct a sheet which could carry all the information required in *Sheet 2*, as well as some additional information:

A	B	C	D	E	F	G	H	I	J	K
WP No	WP Type	Partner	Country	Task/description	Staff Name	Staff Code	No. days	Annual salary	Cost per day	Total

— WP No/WP Type: we have added two columns to provide information on the workpackage number (as in *Sheet 5* of the *Application Form*, and also its type (coded as in the previous sheet)..

— We have included the <u>Partner</u> and <u>Country</u> code columns, exactly as in the *Staff* sheet; similarly, the No. of days.

— Task/description: we think it would be helpful to be able to identify the costs associated with particular tasks, both for our own purposes and in case we need to justify them.

— Staff Name: for similar reasons, we have added a Staff Name column.

— Staff Code: here we have added a column to allow us to code staff according to the four categories in the Tables.

— Annual salary: this column is for the total gross annual salary figure and any social costs.

— Cost per day: this calculates the cost per day by dividing the annual salary figure by 220 days. (In Row 2 of the sheet, in cell J2, the formula is **=I2/220** which is then copied to all the other cells in this column.)

— Total: this multiplies the number of days by the cost per day. (For K2, the formula is **=H2*J2** which is then copied to the rest of column K.)

— In the next illustration, we have begun to add some data from our sample project.

	A	B	C	D	E	F	G	H	I	J	K
1	WP No	WP Type	Partner	Country	Task/description	Staff Name	Staff Code	No. days	Annual salary	Cost per day	Total
2	WP1	MNGT	P1	United Kingdom - UK	Project Management Committee	C. Smith	1	6	65,250	297	1,780
3	WP1	MNGT	P1	United Kingdom - UK	Coordination	V. Wise	1	150	60,000	273	40,909
4	WP1	MNGT	P1	United Kingdom - UK	Project Management Committee	T. Jones	2	4	50,000	227	909
5	WP1	MNGT	P1	United Kingdom - UK	Reporting	T. Jones	2	6	50,000	227	1,364
6	WP1	MNGT	P1	United Kingdom - UK	Reporting	A. Evans	4	30	34,500	157	4,705
7	WP1	MNGT	P2	France - FR	Project Management Committee	C. Claudel	1	4	60,000	273	1,091
8	WP1	MNGT	P2	France - FR	Reporting	C. Claudel	1	6	60,000	273	1,636
9	WP1	MNGT	P2	France - FR	Reporting	R. Dubois	4	8	33,596	153	1,222
10	WP1	MNGT	P3	Espana -ES	Project Management Committee	M. Rodriguez	1	4	59,750	272	1,086
11	WP1	MNGT	P3	Espana -ES	Reporting	M. Rodriguez	1	6	59,750	272	1,630
12	WP1	MNGT	P3	Espana -ES	Reporting	P. Perez	4	8	27,500	125	1,000
13	WP1	MNGT	P4	Deutschland - DE	Project Management Committee	H. Schmidt	1	4	55,000	250	1,000
14	WP1	MNGT	P4	Deutschland - DE	Reporting	H. Schmidt	1	6	55,000	250	1,500
15	WP1	MNGT	P4	Deutschland - DE	Reporting	G. Braun	4	8	38,750	176	1,409
16	WP2	DEV	P1	United Kingdom - UK	Design training module/materials	T. Jones	2	5	50,000	227	1,136
17	WP2	DEV	P1	United Kingdom - UK	Design training module/materials	N. Green	2	30	43,250	197	5,898
18	WP2	DEV	P2	France - FR	Design training module/materials	K. Laval	2	20	45,690	208	4,154
19	WP2	DEV	P2	France - FR	Design training module/materials	F. France	2	25	42,780	194	4,861
20	WP2	DEV	P2	France - FR	Design training module/materials	L. Pujol	3	15	37,560	171	2,561
21	WP2	DEV	P2	France - FR	Design training module/materials	S. Cavour	3	5	47,800	217	1,086
22	WP2	DEV	P3	Espana -ES	Design training module/materials	D. Sanchez	2	5	45,700	208	1,039
23	WP2	DEV	P4	Deutschland - DE	Design training module/materials	B. Schlink	2	5	40,000	182	909
24	WP3	DEV	P1	United Kingdom - UK	Training trainers	N. Green	2	5	43,250	197	983
25	WP3	DEV	P2	France - FR	Training trainers	K. Laval	2	20	45,690	208	4,154
26	WP3	DEV	P3	Espana -ES	Training trainers	D. Sanchez	2	15	45,700	208	3,116
27	WP3	DEV	P4	Deutschland - DE	Training trainers	B. Schlink	2	5	40,000	182	909
28	WP4	DEV	P1	United Kingdom - UK	Deliver training	N. Green	2	30	43,250	197	5,898

— The illustration above shows the start of working through the whole project in a logical sequence, workpackage by workpackage. We will next make a copy of this worksheet (in Excel, **Edit > Copy sheet** and check the **Create a copy** box), so that we still have our original data, safe in its original form. In the new sheet, using the Sort and Sub-total functions of the Excel program, we can now begin to manipulate the data.

— The next illustration shows the same data, but this time sorted: first by Partner, then by Staff Code. (In Excel: highlight all the data, including Row 1, then **Data > Sort** and select the appropriate sort criteria.) We have then used the Excel Sub-totals function (**Data > Sub-totals** then **Sum**) to insert sub-totals in the No. days and Total columns, following each change in Staff Code. We have then also added a further column L to show the Average Cost per Day and have added a formula at each sub-totalled row in column L to produce the average daily rate for each category of staff (in L5, the formula is **=K5/H5**).

— This provides us with precisely the figures that we need for *Sheet 2: Staff*: i.e. the total days and the average daily rate for each category of staff in each partner organisation, as you will see in the following illustration:

	A	B	C	D	E	F	G	H	I	J	K	L
1	WP No	WP Type	Partner	Country	Task/description	Staff Name	Staff Code	No. days	Annual salary	Cost per day	Total	Average cost/day
2	WP1	MNGT	P1	United Kingdom -	Project Management Committee	C. Smith	1	6	65,250	297	1,780	
3	WP1	MNGT	P1	United Kingdom -	Coordination	V. Wise	1	150	60,000	273	40,909	
4	WP6	EXP	P1	United Kingdom -	Exploitation plan	C. Smith	1	6	65,250	297	1,780	
5	WP7	QPLAN	P1	United Kingdom -	Quality plan	C. Smith	1	3	65,250	297	890	
6							1 Total	165			45,358	275
7	WP1	MNGT	P1	United Kingdom -	Project Management Committee	T. Jones	2	4	50,000	227	909	
8	WP1	MNGT	P1	United Kingdom -	Reporting	T. Jones	2	6	50,000	227	1,364	
9	WP2	DEV	P1	United Kingdom -	Design training module/material	T. Jones	2	5	50,000	227	1,136	
10	WP2	DEV	P1	United Kingdom -	Design training module/material	N. Green	2	30	43,250	197	5,898	
11	WP3	DEV	P1	United Kingdom -	Training trainers	N. Green	2	5	43,250	197	983	
12	WP4	DEV	P1	United Kingdom -	Deliver training	N. Green	2	30	43,250	197	5,898	
13	WP4	DEV	P1	United Kingdom -	Deliver training	T. Jones	2	10	50,000	227	2,273	
14	WP5	DISS	P1	United Kingdom -	Dissemination	T. Jones	2	5	50,000	227	1,136	
15	WP6	EXP	P1	United Kingdom -	Exploitation plan	T. Jones	2	4	50,000	227	909	
16	WP7	QPLAN	P1	United Kingdom -	Quality plan	T. Jones	2	3	50,000	227	682	
17	WP7	QPLAN	P1	United Kingdom -	Quality plan	N. Green	2	10	43,250	197	1,966	
18							2 Total	112			23,153	207
19	WP4	DEV	P1	United Kingdom -	Deliver training	E. Mackay	3	15	35,000	159	2,386	
20							3 Total	15			2,386	159
21	WP1	MNGT	P1	United Kingdom -	Reporting	A.Evans	4	30	34,500	157	4,705	
22	WP5	DISS	P1	United Kingdom -	Dissemination	A.Evans	4	5	34,500	157	784	
23							4 Total	35			5,489	157
24	WP1	MNGT	P2	France - FR	Project Management Committee	C. Claudel	1	4	60,000	273	1,091	
25	WP1	MNGT	P2	France - FR	Reporting	C. Claudel	1	6	60,000	273	1,636	
26	WP5	DISS	P2	France - FR	Dissemination	C. Claudel	1	5	60,000	273	1,364	
27	WP6	EXP	P2	France - FR	Exploitation plan	C. Claudel	1	5	60,000	273	1,364	
28	WP7	QPLAN	P2	France - FR	Quality plan	C. Claudel	1	3	60,000	273	818	
29							1 Total	23			6,273	273
30	WP2	DEV	P2	France - FR	Design training module/material	K. Laval	2	20	45,690	208	4,154	

— If we go back to our original sheet and make a further copy, we can also use the Excel program to provide us with the information that we need for the Resources table in *Section 5* of the Application Form. This time we need to sort the data in a different sequence: first by Partner, then by Staff Code and then by WP No. We can then use the Sub-total function to insert a sub-total in the No. Days column at each change in the WP No. This provides the following:

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	WP No	WP Type	Partner	Country	Task/description	Staff Name	Staff Code	No. days	Annual salary	Cost per day	Total
1											
2	WP1	MNGT	P1	United Kingdom - UK	Project Management Committee	C. Smith	1	6	65,250	297	1,780
3	WP1	MNGT	P1	United Kingdom - UK	Coordination	V. Wise	1	150	60,000	273	40,909
4	**WP1 Total**							**156**			
5	WP6	EXP	P1	United Kingdom - UK	Exploitation plan	C. Smith	1	6	65,250	297	1,780
6	**WP6 Total**							**6**			
7	WP7	QPLAN	P1	United Kingdom - UK	Quality plan	C. Smith	1	3	65,250	297	890
8	**WP7 Total**							**3**			
9	WP1	MNGT	P1	United Kingdom - UK	Project Management Committee	T. Jones	2	4	50,000	227	909
10	WP1	MNGT	P1	United Kingdom - UK	Reporting	T. Jones	2	6	50,000	227	1,364
11	**WP1 Total**							**10**			
12	WP2	DEV	P1	United Kingdom - UK	Design training module/materials	T. Jones	2	5	50,000	227	1,136
13	WP2	DEV	P1	United Kingdom - UK	Design training module/materials	N. Green	2	30	43,250	197	5,898
14	**WP2 Total**							**35**			
15	WP3	DEV	P1	United Kingdom - UK	Training trainers	N. Green	2	5	43,250	197	983
16	**WP3 Total**							**5**			
17	WP4	DEV	P1	United Kingdom - UK	Deliver training	N. Green	2	30	43,250	197	5,898
18	WP4	DEV	P1	United Kingdom - UK	Deliver training	T. Jones	2	10	50,000	227	2,273
19	**WP4 Total**							**40**			
20	WP5	DISS	P1	United Kingdom - UK	Dissemination	T. Jones	2	5	50,000	227	1,136
21	**WP5 Total**							**5**			
22	WP6	EXP	P1	United Kingdom - UK	Exploitation plan	T. Jones	2	4	50,000	227	909

— In this way, from the same set of data, sorted and sub-totalled in different ways, we can produce all of the information we need to complete Sheet 2: Staff and the Application Form. We can then enter the relevant figures manually into the final documents, copy and paste them, or paste a link between the two, so that any changes in the underlying sheets are automatically updated in the final documents.

— Whichever way you choose to do things, whether with a separate spreadsheet as we have demonstrated, or just with manual calculations or a calculator, here is what a completed *Sheet 2* should look like. We have used all the staffing data from the workbook for our sample project:

		Country	Overall total number of working days	Overall total staff costs	1. Manager			2. Researcher, teacher and / or trainer			3. Technical			4. Administrative		
					Number of working days on the project	Cost per day	Total staff cost by category	Number of working days on the project	Cost per day	Total staff cost by category	Number of working days on the project	Cost per day	Total staff cost by category	Number of working days on the project	Cost per day	Total staff cost by category
7		Total working days	754		224			371			90			69		
8		Total staff costs		162,920			61,050			75,485			15,595			10,790
9	P1	United Kingdom - UK	327	76,439	165	275	45,375	112	207	23,184	15	159	2,385	35	157	5,495
10	P2	France - FR	164	33,429	23	273	6,279	98	200	19,600	30	178	5,340	13	170	2,210
11	P3	Espana -ES	134	26,626	18	272	4,896	93	201	18,693	10	136	1,360	13	129	1,677
12	P4	Deutschland - DE	129	26,426	18	250	4,500	68	206	14,008	35	186	6,510	8	176	1,408
13	P5		0	0			0			0			0			0

ESTIMATED staff needs and costs by partner
All figures in Euro
Staff by category

Sheet 3: Travel and subsistence

— This sheet requires you to enter, in a single row, all the travel and subsistence costs associated with a particular activity or event. Here is Sheet 3 from our sample project:

	A	B	C	D	E	F	G	H
1	ESTIMATED travel and subsistence costs							
2	All figures in Euro							
3								
4	Purpose of the journey	Country of destination	Work Package	Number of	Number of days	Daily subsistence	Average price	Total costs
5				a	b	c	d	a x [(b x c) + d]
6				149	45	TOTAL travel & subsistence cost		123,763
7	Project Management Committee 1 - Month 1 - London	United Kingdom - UK	1	5	2	236	180	3,260
8	Project Management Committee 2 - Month 6 - London	United Kingdom - UK	1	5	2	236	180	3,260
9	Project Management Committee 3 - Month 12 - London	United Kingdom - UK	1	5	2	236	180	3,260
10	Project Management Committee 4 - Month 24 - London	United Kingdom - UK	1	5	2	236	180	3,260
11	Materials preparation workshop 1 - Month 2 - Montpellier	France - FR	2	8	2	210	150	4,560
12	Materials preparation workshop 2 - Month 4 - Madrid	Espana -ES	2	8	2	245	263	6,024
13	Materials preparation workshop 2 - Month 6 - Munich	Deutschland - DE	2	8	2	240	263	5,944
14	Training Trainers course - Month 9 - Paris	France - FR	3	20	5	250	200	29,000
15	Training courses UK - Months 11-21 (2x 2 days + preparation)	United Kingdom - UK	4	17	5	150	100	14,450
16	Training courses France - Months 11-21 (2 x 2 days + preparation)	France - FR	4	17	5	165	120	16,065
17	Training courses Spain - Months 11-21 (2 x 2 days + preparation)	Espana -ES	4	17	5	100	75	9,775
18	Training courses Germany - Months 11-21 (2 x 2 days + preparation)	Deutschland - DE	4	17	5	125	100	12,325
19	Coordinatiion meeting EACEA - Brussels	Belgique/Belgie - BE	5	4	2	225	350	3,200
20	Dissemination conference - Month 24 - Berlin	Deutschland - DE	5	8	2	250	265	6,120
21	Evaluation meeting - Month 23 - London	United Kingdom - UK	7	5	2	236	180	3,260

— At first glance, this probably looks quite straightforward. However, on closer examination, as we consider how we obtain the necessary information, it presents one or two difficulties:

– In this sheet you must use a separate row for the travel and subsistence associated with a particular activity. There is a maximum of 30 rows in each of Sheets 3-6.

– You will notice that Column G calls for the average price for return travel. This is another figure, like the average daily staff rate that we met in the previous sheet, that you will need to calculate separately and that you will find it difficult to arrive at without having produced a more detailed budget.

– Note, too, that this form does not invite you to, or indeed enable you to, identify costs separately for each partner organisation, although when we come to look at Sheet 7, you will find that we will need to have calculated this as well.

– Consider, too, that in relation to the information required in Columns D and E, a single activity may often involve different people for different lengths of time. It may also involve people who will be claiming subsistence but who have no travel costs. In either case, you will again need to calculate an average number of days per person.

— Our response to all these points, particularly in a project where there is a lot of travel and a lot of partners, would be to adopt a similar approach to the one we took in dealing with Sheet 2. We would construct a separate spreadsheet:

	A	B	C	D	E	F	G	H	I	J	K	L	M
								Daily subsist. cost	Total subsist. cost	Travel cost	Total Travel	Average daily subsist.	Average travel
1	Purpose of journey	Partner	Country of destination	WP No	Name/category	No. persons	No. days						

You will see that we have added columns for Partner, Name/Category of Staff, Total Subsistence Cost, Travel Cost and Total Travel Cost. Finally, we have added columns L and M to enable us to average the daily subsistence and the travel costs. This sheet allows us to assemble much more detailed information, using one row for each person or category of persons from each organisation.

– Column I Total Subsistence is No. of Persons x No. of Days x Daily Subsistence.

– Column K Total Travel is No. of Persons x (individual) Travel Cost.

We can then sort and sub-total information, as we did with the staffing information:

– If we sort by Journey (Column A) and then sub-total by Journey, adding sub-totals in the columns for No. of Persons, No. of Days, Total Subsistence and Total Travel, we can calculate in Columns L and M, in the sub-total rows, the Average Daily Subsistence and the Average Travel Cost for each journey.

— The Average Daily Subsistence equals Total Subsistence divided by No. of Persons divided by No. of Days.

> — The Average Travel equals Total Travel divided by No. of Persons.
>
> This provides us with the figures we need to complete Sheet 3: Travel and subsistence.
>
> > – If we make another copy of our worksheet and this time sort and sub-total our information by Partner, we then have a figure for how much of the total travel and subsistence cost is attributable to each partner, which will be helpful when we come to look at Sheet 7.

— It is advisable to obtain as much detailed information as possible on actual costs, as you compile your budget. Ask for quotes from hotels and conference centres and look at the web sites of travel companies for fare prices.

— If, when you have completed your calculations, the average daily subsistence cost exceeds the rate allowable for the country where the activity is to take place, you must either find a way of reducing the cost or accept that any amount in excess of the permitted rate cannot be included in the project budget. The spreadsheet will not allow you to enter a rate above the maximum for the country in question.

— When you come to enter data in Sheet 3, you should start by selecting in Column B the country to which people are travelling for the activity, as this will determine the level of subsistence allowance that is accepted.

— Note, too, that the information you present here will need to be consistent with the information you provide in Section 4.F of the Application Form and should be easy to reconcile with this (numbers of trips and participants, length of stay, etc). You will also need to provide some more detailed explanation of some of your calculations in the Explanation of workpackage expenditures part of Section 4.F.

Sheet 4: Equipment

— Many projects may not have any items to include in Sheet 4.

— Nonetheless, if your project does involve a lot of equipment and a lot of partners, it may be helpful to do as we have done with the previous sheets and to prepare a separate spreadsheet, so that you sort and sub-total by Partner.

— Remember that this sheet must not include details of computers and other office equipment used for the general administration of the project. A notional contribution towards the cost of these is included in the Indirect Cost (overhead allowance).

— Sheet 4 asks for a description of the item of equipment and a justification for its use in the project. Then it asks for the number of items of a similar type and their cost. Note that the cost may be the cost of purchase or the cost of hire or leasing.

— Next you need to provide the rate of usage within the project as a percentage - for example, if it were to be used for 2.5 days per week

for 9 months in a 2-year project, you would enter 18.75% (9 divided by 24 divided by 2 multiplied by 100).

— Finally, if you are purchasing the equipment, you need to enter the depreciation rate as a percentage – for example, depreciation over 3 years would be 33.33% each year and depreciation over 4 years 25% each year. Please note, however, that, if your project last for more than 12 months, you should enter each year's depreciation in a separate row, as the Excel sheet will not automatically calculate this.

— If you will be renting the equipment, make this clear in the justification and set the depreciation rate at 100%.

— The total equipment cost must not exceed 10% of the Direct Cost.

— Here is the Equipment sheet from our sample project:

	A	B	C	D	E	F	G	H	I
1	**ESTIMATED equipment costs**								
2	All figures in Euro								
3									
4	**Description**	**Justification**	**Partner(s)**	**Work Pack age**	**Number of items**	**Unit Cost**	**Usage rate %**	**Depreciation rate**	**Total costs**
5					a	b	c	d	a x b x c x d
6								Total equipment costs	13,750
7	Video projector	Rental - Training Trainers course - Paris - 5 days	P2	3	5	250	100.00%	100.00%	1,250
8	Interpreter equipment	Rental - Training Trainers course - Paris - 5 days	P2	3	5	1000	100.00%	100.00%	5,000
9	Video projector	Rental UK national training courses - 2 x 2 days	P1	4	4	250	100.00%	100.00%	1,000
10	Video projector	Rental FR national training courses - 2 x 2 days	P2	4	4	250	100.00%	100.00%	1,000
11	Video projector	Rental ES national training courses - 2 x 2 days	P3	4	4	250	100.00%	100.00%	1,000
12	Video projector	Rental DE national training courses - 2 x 2 days	P4	4	4	250	100.00%	100.00%	1,000
13	Interpreter equipment	Dissemination conference - Berlin - 2 days	P4	5	2	1000	100.00%	100.00%	2,000
14	Web server	Project web site - 2 years	P4	5	2	3000	100.00%	25.00%	1,500
15									0
16									0

Sheet 5: Subcontracting

— This, too, is a fairly simple sheet. You need to include details of all the subcontracted costs for services that the partner organisations cannot provide themselves. In each case, you need to provide a full justification in the task description. On this sheet, include the costs of any external experts and/or trainers who are not employed directly by partners.

— If your project has a lot of partners with several subcontracts, you may again find it helpful to make a separate spreadsheet to calculate the total amount of subcontracting per partner.

— Provide as much detail as possible in the Description field. Specify, for example, the number of days involved and the daily or weekly rate for an item. For translations, indicate the number of pages, the cost per page and specify the languages involved. For publications, indicate the number of copies, the number of pages and the languages involved, as well as the cost.

— Remember that the total subcontracting cost must not account for more than 30% of the Direct Cost of the project.

— Here is the sheet for our sample project:

	A	B	C	D	E
1	ESTIMATED subcontracting costs				
2	All figures in Euro				
3					
4	Subcontract	Task description	Partner(s)	Work Package	Total costs
5			Total subcontracting costs:		74,700
6	Subcontract 1	Development of web site and online training materials - 20 days @ 750 €	P4	6	15,000
7	Subcontract 2	Evaluation consultant - 20 days @ 500 €	P1	7	10,000
8	Subcontract 3	External experts - Training Trainers course - 2 days @ 500 €	P2	3	1,000
9	Subcontract 4	Graphic design for training materials - 5 days @ 600 €	P3	2	3,000
10	Subcontract 5	Translation of online materials/web pages - EN to FR/DE/ES - 50 pages x 3 languages x 60 € per page	P2	2	9,000
11	Subcontract 6	Translation of printed training manuals - EN to FR/DE/ES - 15 pages x 3 languages x 60 € per page	P2	2	2,700
12	Subcontract 7	Printing training manuals - 1500 copies in EN/FR/DE/ES = 6000 copies @ 1 € each	P1+P2+P3+P4	2	6,000
13	Subcontract 8	Interpreters for Training Trainers course - 4 languages x 5 days x 2 interpreters x 500 € per day	P2	3	20,000
14	Subcontract 9	Interpreters for Dissemination conference - 4 languages x 2 days x 2 interpreters x 500 € per day	P4	5	8,000

Sheet 6: Other

— This sheet contains information on all other items of expenditure. This will include a number of costs associated with the principal activities of the project, for example, costs of room hire, translation, interpretation, publishing costs, dissemination costs, and seminar and conference fees. Also include here any costs for audits or financial guarantees. Here is sheet for our sample project:

	A	B	C	D	E
1		**ESTIMATED other costs**			
2		All figures in Euro			
3					
4		**Description**	**Partner(s)**	**Work Package**	**Amount**
5				Total other costs:	10,400
6	1	Premises rental for Training Trainers course - 5 days @ 400 €	P2	3	2,000
7	2	Premises rental for national training courses - 2 x 2 days @ 400 €	P1	4	1,600
8	3	Premises rental for national training courses - 2 x 2 days @ 400 €	P2	4	1,600
9	4	Premises rental for national training courses - 2 x 2 days @ 400 €	P3	4	1,600
10	5	Premises rental for national training courses - 2 x 2 days @ 400 €	P4	4	1,600
11	6	Premises rental for Dissemination Conference 2 days @ 1,000 €	P4	5	2,000

— As most projects are likely to have several items in this expenditure category, with costs being borne by several partners, it may again be helpful to create a separate spreadsheet, enabling you to sort and sub-total by Partner and providing you with a figure for the total Other Costs per Partner.

— Note that photocopying costs should not be entered here. These costs are part of the Indirect Costs.

Sheet 7: Expenditure & revenue

Finally, we will look at Sheet 7. Here is the blank form:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	ESTIMATED EXPENDITURES and REVENUE by TYPE OF COSTS and by PARTNER									Project Acronym:							
2	All figures in Euro									LLP Action:							
3																	
4					Costs									Financing			
5				Direct costs					Indirect costs	Total project expenditures		Community grant requested from		Partner's	Other sources		Total project revenues
6				B. Operations				Total direct costs (A + B)	Total project indirect costs (up to 7%)			Grant total (up to 75%)		own funding			
7		A. Staff costs	1. Travel and subsistence	2. Equipment (up to 10%)	3. Subcontracting (up to 30%)	4. Other	B.Total operational costs			Total	%		%		Amount	Specification	
8	%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		0.00%			0.00%		0.00%	0.00%		100%
9	Total	0	0	0	0	0	0	0	0	0		0		0	0		0
10	P1	0								0	0.00%	0	0.00%				0
11	P2	0								0	0.00%	0	0.00%				0

- You will see that the form is divided vertically into two main sections: **Costs** (Columns B-K) and **Financing** (Columns L-Q). These represent the expenditure and the income sides of the budget and the totals in each need to balance.

- We have noted before that the costs from *Sheets 2-6* are automatically transferred to this sheet. The next illustration shows a copy of the Costs section of Sheet 7 with these transferred costs but before any other information has been entered directly to this sheet:

	A	B	C	D	E	F	G	H	I	J	K
5					Direct costs				Indirect costs	Total project expenditures	
6					B. Operations			Total direct costs (A + B)	Total project indirect costs (up to 7%)		
7		A. Staff costs	1. Travel and subsistence	2. Equipment (up to 10%)	3. Subcontracting (up to 30%)	4. Other	B.Total operational costs			Total	%
8	%	ERROR	0.00%	0.00%	0.00%	0.00%	0.00%		0.00%		
9	Total	162,920	123,763	13,750	74,700	10,400	222,613	ERROR	0	0	
10	P1	76,439								0	0.00%
11	P2	33,429								0	0.00%
12	P3	26,626								0	0.00%
13	P4	26,426								0	0.00%

— Notice that:

– The staff costs per partner have been transferred to Column B and the total costs from Sheets 2-6 have been transferred to Row 9 in Columns C – G. Row 8 is intended to show these figures as a percentage of the Total Direct Costs but the percentages remain at zero.

– There are **ERROR** messages in Cells B8 and H9. These will only disappear when you have entered figures in Column H which together equal the Total Direct Costs of the Project.

– Column H calls for the Total Direct Costs of the project (i.e. the Staff Costs plus the Operation Costs) to be allocated between the various partners. The staffing element of this is broken down between partners in Column A but, as we have noted earlier, there has been no in-built provision to identify the individual partner allocations of costs in Sheets 2-6 and these costs are simply shown as total project costs in Row 9. This is where you will need to have recourse to

your more detailed working figures and where any additional spreadsheets you have created to show partner allocations will come in handy.

‒ There are reminders in D7, E7 and I7 of the percentage limits for the costs in these columns. If the figures in Row 9 exceed these percentages, **ERROR** messages will appear in Row 8. If this happens, you will need to go back to the appropriate sheet and reduce figures accordingly.

‒ The final stage of completing the Costs side of the spreadsheet is to enter the Indirect Costs for each partner in Column I. Remember that the total Indirect Costs for the whole project must not exceed 7% of the Total Direct Costs. The percentage of Indirect Costs for individual partners may vary and may exceed 7%, as long as the overall ceiling is not breached. If it is, an **ERROR** message will show in Cell I8.

— Here is the sheet with the Costs side completed:

	A	B	C	D	E	F	G	H	I	J	K
5		Direct costs							Indirect costs	Total project expenditures	
6			B. Operations					Total direct costs (A + B)	Total project indirect costs (up to 7%)		
7		A. Staff costs	1. Travel and subsistence	2. Equipment (up to 10%)	3. Subcontracting (up to 30%)	4. Other	B.Total operational costs			Total	%
8	%	42.26%	32.10%	3.57%	19.38%	2.70%	57.74%		6.94%		
9	Total	162,920	123,763	13,750	74,700	10,400	222,613	385,533	26,750	412,283	
10	P1	76,439						155339	6500	161839	39.25%
11	P2	33,429						101279	6750	108029	26.20%
12	P3	26,626						71900	6750	78650	19.08%
13	P4	26,426						57015	6750	63765	15.47%
14	P5	0								0	0.00%

— As you enter figures in Columns H and I on the Costs side of the spreadsheet, other **ERROR** messages will begin to appear in Cells L8, N8, O8 and Q9 on the Financing side of the sheet. These will only disappear when the overall income and expenditure balance and the various percentage limits are respected:

	G	H	I	J	K	L	M	N	O	P	Q
5			Indirect costs	Total project expenditures		Community grant requested from LLP		Partner's own funding	Other sources		Total project revenues
6	B.Total operational costs	Total direct costs (A + B)	Total project indirect costs (up to 7%)	Total	%	Grant total (up to 75%)	%		Amount	Specification	
7											
8	57.74%		6.94%			ERROR		ERROR	ERROR		100%
9	222,613	385,533	26,750	412,283		0		0	0		ERROR
10		155339	6500	161839	39.25%		0.00%				0
11		101279	6750	108029	26.20%		0.00%				0
12		71900	6750	78650	19.08%		0.00%				0
13		57015	6750	63765	15.47%		0.00%				0

— To complete the Financing side of Sheet 7, you need to:

  – Enter the amount of Community grant allocated to each partner in Column L. Note that, although the percentage allocation of the grant may vary between partners, the percentage contribution to the project overall must not exceed 75%. No partner, however, must make a profit from the project, so the grant contribution for any partner must not exceed 100% of its costs.

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- In Column N you are required to enter the contributions to be provided by the partner organisations. Remember from the previous section of this chapter that this can include the provision of staffing.

- Column O is for any contributions from other sources. This may include other grant funding from, for example, other national or regional bodies, as well as private sponsorship and any income earned by the project activities. Specify the source in Column P.

- Finally, you need to complete Cells L1 and L2 to identify your project:

  - In L1, enter the acronym for your project. Make sure that this is identical to the one you entered on the cover sheet of the Application Form.

  - In L2, select the name of the LLP Action that you are applying to from the drop-down list. Again, make sure that this corresponds to the Action selected on the cover sheet of the Application Form.

- Remember, though, that you also need to copy the final figures from Cells B9-F9, H9-J9 and L9-P9 into the Budget in Section C.5 of the Application Form. You will also need to include the figure in L9 in the Declaration of Honour as well.

- You are also advised to provide as much justification as possible for budgeted costs, making a detailed explanation of your calculations in Section F.4 of the Application Form.

- Remember, too, that you need to attach a copy of the Detailed financial tables to the eForm before you submit it, as well as e-mailing an electronic version and sending a hard copy by surface mail as part of the Application Package. You should save the final version of the file as:

  [country code]_[action]_[project acronym].xls (for example, uk_leonardo_etudes.xls).

The next illustration shows the final completed version of Sheet 7 of the budget for our sample project:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	ESTIMATED EXPENDITURES and REVENUE by TYPE OF COSTS and by PARTNER									Project Acronym:		ETUDES					
2	All figures in Euro									LLP Action:		Leonardo da Vinci Multilateral Projects - Development of					
3																	
4		Costs										Financing					
5		Direct costs							Indirect costs	Total project expenditures		Community grant requested from LLP		Partner's own funding	Other sources		Total project revenues
6			B. Operations					Total direct costs (A + B)									
7		A. Staff costs	1. Travel and subsistence	2. Equipment (up to 10%)	3. Subcontracting (up to 30%)	4. Other	B.Total operational costs		Total project indirect costs (up to 7%)	Total	%	Grant total (up to 75%)	%		Amount	Specification	
8	%	42.26%	32.10%	3.57%	19.38%	2.70%	57.74%		6.94%			71.82%		23.94%	4.24%		100%
9	Total	162,920	123,763	13,750	74,700	10,400	222,613	385,533	26,750	412,283		296,087		98,696	17,500		412,283
10	P1	76,439						155339	6500	161839	39.25%	113,879	70.37%	37,960	10,000	UK government fund	161,839
11	P2	33,429						101279	6750	108029	26.20%	81,022	75.00%	27,007			108,029
12	P3	26,626						71900	6750	78650	19.08%	58,987	75.00%	19,663			78,650
13	P4	26,426						57015	6750	63765	15.47%	42,199	66.18%	14,066	7,500	Regional training grant	63,765
14	P5	0								0	0.00%		0.00%				0

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Completing the budget forms for other actions

— As we have indicated previously, it is impossible to look in the same amount of detail at the financial tables for the other actions, as these are largely managed by the National Agencies and take a variety of different forms.

— They will, however, almost certainly be simpler than the financial tables for the centralised actions that we have just been looking at. Many will be based to a large extent on pre-determined scales of unit costs or flat-rate lump sums. In most cases, too, they will be part of a single Application Form, often presented as a Word or PDF document, often with some built-in calculation functions.

— Increasingly, National Agencies are moving to online electronic submission of applications. Some of these may involve forms to be completed online; others may take the form of downloadable eForms requiring simply that the submission is completed online.

— If you are faced with a more complicated budget form from a National Agency, an understanding of the principles and procedures in the previous section should help in approaching it, even though the actual format will undoubtedly be different.

Some final points to remember

— You will find it easier to construct a detailed budget, if you first have a detailed breakdown of project activities.

— Make sure that the links between the estimated budget and the project activities as described in the Application Form are signposted clearly and that it is evident why each cost is being incurred.

— If your organisation is involved in more than one EU project, make sure that there is no overlap of funding.

— Make sure that you have read all the supporting documentation carefully and have understood all the financial regulations. If there is anything that you do not understand, check the FAQ section of the EACEA web site[118] and the web site of your National Agency to see if there is more information. If not, then get in touch with the appropriate Agency by phone or e-mail and ask for advice[119].

— Make sure that your budget is realistic and that it represents value for money. The assessors will look closely at both of these aspects and are likely to reject the proposal, if the costs are too high for the expected results.

— It is unlikely that the first version of the budget that you produce will be perfect. Be prepared to work with the figures until you have a satisfactory balance on every front. Budgeting is an iterative process.

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[118] See http://eacea.ec.europa.eu/llp/funding/2009/call_lifelong_learning_2009.htm#PhaseI.
[119] For details of the National Agencies, see Appendix 1.

— Although one person needs to have charge of drawing up the budget, involve others closely in the process. Seek information and advice from colleagues and from partners on the likely costs for particular items. Have them read through the documents to check for omissions or discrepancies between the description of activities in the Application Form and the information in the Financial Tables. Whatever you do, do not simply pass the budget forms over to be handled by a finance officer, who may have little understanding of the detail of the project or of the financial rules of the LLP.

— Finally, check and double-check the forms before you submit the application.

In this chapter we have looked in some detail at the financial aspects of an application. In the final chapter we will look at what happens to the application, once you have submitted it and at how it is likely to be assessed and evaluated.

Chapter 11

What happens next?

This chapter looks briefly at what happens to your application after it has been submitted and outlines the process and the criteria for assessment.

Shortly after you have submitted your application, whether to the National Agency or to the AECEA, you should receive a notice acknowledging its receipt, informing you that it has been logged in the system and given a reference number. This should happen within 30 days of the application being submitted.

You are then unlikely to hear anything further for some months.

Assessment

During that period of silence, your application will be being assessed. The details of the process may differ in different countries, but it will follow a common pattern and contain similar elements:

— First, there will be an examination of your application's technical eligibility to be considered for funding, which will normally be conducted by the staff of the Agency involved. At this stage, the quality of the proposal itself does not come into play. Instead, the examination considers:

  – Whether the applicants are based in eligible countries

  – Whether they meet one of the criteria for exclusion (bankruptcy, administration, fraud, professional misconduct, etc)

  – Whether the proposed beneficiaries fall into the approved categories for the sub-programme and Action

  – Whether the posting date on the application complies with the deadline

  – Whether all the necessary elements of the application package have been delivered (application form, budget, Declaration of Honour, etc)

  – Whether the correct forms have been completed in full, in an accepted language, and whether all the requisite signatures have been obtained

  – Whether the partnership and the duration of the project comply with the terms of the Call.

— Only if your application passes this technical examination will it proceed to a detailed assessment of its quality. In this second phase, it is likely to be scrutinised by independent experts, who will judge its merits against:

- The LLP Objectives and more specifically against the Priorities of the current Call for Proposals

- The thematic Priorities of the specific action

- The Award Criteria for the action and any weighting (see [Chapter 9](#))

- The horizontal policies of the Community

- The operational capacity of the consortium to deliver the project, as evidenced by partners' CVs and previous experience

- The coherence between objectives, work programme and budget

- The cost/benefit ratio of the project and its value for money

- In the case of applications passing through National Agencies, an added consideration may well be given to the extent to which the project involves individuals or organisations who have not previously participated in the activities of the LLP or its predecessors, as well as people with special needs and disadvantaged groups.

— We have already noted that for the 2009 Call for applications for Multilateral Projects, Networks, Accompanying Measures, Studies and Comparative Research, all of which are handled by the EACEA, a two-phase selection process has been introduced. In the first phase, after the Application Package has passed its technical evaluation, it then goes through a peer review process which examines the content of the proposal. Here it is evaluated independently by two experts who fill in individual evaluation forms, providing comments and awarding marks against a set scoring system. Following the assessment, the two experts come together to agree a common assessment score and a joint comment against each of the Award Criteria. If they are unable to reach agreement, a third independent evaluation is sought.

The Agency will then publish a list of those projects that could potentially be approved on the basis of their scores against the Award Criteria and invites successful candidates to provide the necessary annexes to the application, including the Letters of Intent from partners. For the 2008 Call, these invitations are likely to be sent in June 2008 and promoters will have 10 working days in which to provide the outstanding documentation.

The second phase documentation will be checked by Agency staff; any incorrect or incomplete documentation will mean that the application receives no further consideration. It is important to understand, however, that a successful completion of both phases of the process does not necessarily guarantee funding; this will depend on the finance available.

Award

— For those applications that are handled under the NA1 procedure (Mobility and Partnerships), the National Agency of the applicant's country reviews the assessment scores against the Award Criteria and decides which proposals are able to be funded.

— For those applications that are handled by the centralised procedure (Multilateral Projects, Networks, Accompanying Measures, Studies and Comparative Research and Jean Monnet), the EACEA produces a list of those applications that have passed the first phase of the assessment process and have reached an agreed threshold score on the Award Criteria, ranked in order of score. Following consultation with Member States and the European Parliament, a decision is then made on which projects to offer funding to. A reserve list is normally also drawn up, in case additional funding becomes available or it proves impossible to conclude a contract with one or more of the projects on the approved list.

— For those applications handled under the NA2 procedure (Leonardo Transfer of Innovation), the assessments made by the relevant National Agencies are reviewed by the EACEA which then draws up a ranked list of projects meeting the agreed threshold score and an identical process is followed to that of the centralised procedure.

— All applicants should be informed in writing of the outcome of the assessment process and should receive an assessment form with a score and a detailed written comment against each of the Award Criteria. If your application is unsuccessful, these can provide helpful guidance on how to improve and perhaps resubmit in a later Call. For the 2009 Call, applicants via the centralised procedure for the sub-programmes, are likely to be informed of results towards the end of June 2009 and for the Transversal Programme centralised actions in July 2009.

— For the 2007 Call for Proposals, a total of 1,482 proposals were received across the entire programme. Of these, 415 were approved – a success rate of 28%. A total of 372M € was requested, of which 88.2M € was allocated – approximately 24%.

Contract

For successful applicants, there then begins the process of contracting. During this, there may be more detailed discussion of the application and points for further clarification – most particularly concerning aspects of the budget, which may be reduced. During this period, there may also be a more detailed examination of the financial capacity of the applicant to carry out the project.

The applicant will then be offered one of the following:

— A grant agreement with an obligation to provide a guarantee for pre-financing (i.e. with an obligation to have a bank underwrite any sums that are advanced by the Commission in instalments during the lifetime of the project, until the final cost report has been accepted).

— A grant agreement without pre-financing (i.e. without monies being advanced in instalments during the lifetime of the project and with a single payment being made on acceptance of the final cost report).

— A grant agreement with pre-financing payments in several instalments (i.e. with sums advanced in several instalments but without the requirement for a bank guarantee).

The grant agreement will almost certainly include the workplan and the budget as annexes. It will also include details of the reporting requirements, procedures for any amendments to the agreement and audit requirements. (Note that you will normally need to retain all financial documentation for the project for five years following the receipt of the last instalment of grant funding.)

The grant agreement will also stipulate the start and end dates of the project. Once that date has arrived and the grant agreement is signed, you will be ready to start the real work of the project itself, when the benefits of the long process of careful preparation can at last be realised.

And finally ...

In writing this handbook, we have been aware of the range of differing experiences that readers are likely to have. For those of you with little or no prior involvement in transnational work, we hope that the detail provided in the technical sections has not proved too daunting and that you will be encouraged to think seriously about getting involved. For those more experienced in project work, we hope we may have opened up some new avenues to explore within the framework of the Lifelong Learning Programme and given fellow trade unionists some idea of the wide range of opportunities that the programme presents.

Working across national and cultural boundaries can be exciting, challenging and enriching – but it can also present challenges. We hope that we have given you some of the tools needed to avoid common pitfalls and to assist with project planning and management.

Within the spirit of the Lifelong Learning Programme, we all continue to learn from our own experiences and those of our colleagues. Feedback from readers and users of this handbook would be greatly appreciated and would contribute to improving subsequent editions. In the meantime, we wish you and your organisation every success in your future projects!

Appendices

Appendix 1

List of National Agencies for the Lifelong Learning Programme

This Annex provides the latest published details of all the National Agencies, responsible for providing information and advice on the LLP and for awarding funds for the decentralised actions. Agencies are listed by country in alphabetical order. Please note that in some countries different aspects of the LLP are managed by different agencies.

Austria

Österreichischer Austauschdienst - Nationalagentur Lebenslanges Lernen
Schreyvogelgasse 2
A-1010 Wien
(Tel : (43) 1 534 08-0
Fax : (43) 1 534 08-20
E-mail: lebenslanges-lernen@oead.at
Website: http://www.lebenslanges-lernen.at

Belgium/ Flemish Community

EPOS vzw
National Agency for Lifelong Learning
Koning Albert II-laan 15
B-1015 Brussel
Tel : (32) 2/553.98.67
Fax : (32) 02/553.98.80
E-mail: info@epos-vlaanderen.be
Website: http://epos-vlaanderen.be/

Belgium/ French Community

Agence francophone pour l'éducation et la formation tout au long de la vie
Chaussée de Charleroi 111
B - 1060 Bruxelles
Tel : (32) 2 542.62.78
Fax: (32) 2 542 62 93
E-mail: aef@aef-europe.be
Website: http://www.aef-europe.be

Belgium/ German speaking Community

Agentur für Europäische Bildungsprogramme VoG
Gospert 1
B-4700 Eupen
Tel : (32) 87 596300
Fax : (32) 87 556474
E-mail: edgar.hungs@dgov.be
Website: http://www.dglive.be/agentur

Bulgaria

Human Resource Development Centre (HRDC)
15, Graf Ignatiev Street, 3rd floor
BG-1000 Sofia
Tel: (359) 2 91 550 10
Fax: (359) 2 91 550 49
E-mail: hrdc@hrdc.bg
Website: http://www.hrdc.bg

Cyprus

Foundation for the management of the European Lifelong Learning Programme
Prodromou and Demetracopoulou 2
CY-1090 Nicosia
Tel: (357) 22 800 893
Fax: (357)22 800 941
Website: http://www.llp.org.cy

Czech Republic

National Agency for European Educational Programmes - Centre for International Services
Senovazne namesti 24
CZ-116 27 Praha 1
Tel: (420) 221 850 100
Fax: (420) 234 621 144
E-mail: info@naep.cz
Website : http://www.naep.cz/

Denmark

Cirius - Agency for information about education and training in Denmark
Fiolstraede 44
DK-1171 Copenhagen K
Tel : (45) 33.95.70.00
Fax: (45) 33.95.70.01
E-mail: cirius@ciriusmail.dk
Website: http://www.ciriusonline.dk/

Estonia

Centre for Educational Programmes, Archimedes Foundation
Koidula 13A
EE-10125 Tallinn
Tel: (372) 696 24 10
Fax: (372) 696 24 26
E-mail: hkk@archimedes.ee
Website: http://www.archimedes.ee/hkk

Finland

Centre for International Mobility (CIMO)
Säästöpankinranta 2A (POB 343)
FI-00531 Helsinki
Tel: (358) 207 868 500
Fax: (358) 207 868 601
Websites: http://www.cimo.fi
          http://www.leonardodavinci.fi/

France

Agence Europe Education Formation France
25, Quai des Chartrons
F - 33080 Bordeaux
Tel : (33) 5 56 00 94 00
Fax: (33) 5 56 00 94 80
E-mail: contact@2e2f.fr
Website: http://www.europe-education-formation.fr

Germany

Nationale Agentur für EU Hochschulzusammenarbeit
Deutscher Akademischer Austauchdienst e V. (Erasmus)
Kennedyallée, 50
D-53175 Bonn
Tel : (49) 228 882 0
Fax : (49) 228 882 555
E-mail: erasmus@daad.de
Website : http://www.eu.daad.de

Nationale Agentur für EU-Bildungsprogramme in Schulbereich, Pädagogischer
Austauschdienst der KMK (Comenius, Study visits)
Lennéstr. 6
D-53113 Bonn
Tel : (49) 228 501 0
Fax : (49) 228 501 259
E-mail: pad.spielkamp@kmk.org
Website : http://www.kmk.org/pad/home.htm

Nationale Agentur Bildung für Europa (Leonardo da Vinci, Grundtvig)
Robert-Schuman-Platz
3D-53175 Bonn
Tel : (49) 228 107 1608
Fax: (49) 228 107 2964
E-mail: na@bibb.de
Website: http://www.na-bibb.de

Greece

Greek State Scholarship's Foundation I.K.Y.
1, Makri & D. Areopagitou St,
GR-11742 Athens
Website: http://www.iky.gr

Hungary

Tempus Public Foundation
Lónyay utca 31 - H-1093 Budapest
Postal address: POB 508 - H-1438 Budapest
Tel: (36) 1 237 13 00
Fax: (36) 1 239 13 29
E-mail: gabriella.kemeny@tpf.hu
Websites: http://www.tka.hu
        http://www.tpf.hu
        http://www.studyinhungary.hu

Iceland

Landskrifstofa Menntaáætlunar Evrópusambandsins
Dunhaga 5
IS- 107 Reykjavik
Tel: (354) 525 43 11
Fax: (354) 525 58 50
E-mail: lme@hi.is
Website: http://www.lme.is

Ireland

Léargas the Exchange Bureau (Comenius, Leonardo da Vinci, Grundtvig, Study visits)
189, Parnell Street,
IE- Dublin 1
Tel: (353) 1 8731411
Fax: (353) 1 8731316
E-mail: lifelonglearnin@leargas.ie
Websites: http://www.leargas.ie
        http://www,llp.ie

The Higher Education Authority (Erasmus)
Brooklawn House,
Crampton Avenue,
Shelbourne Road
IE-Dublin 4
Tel : (353) 1 2317100
Fax. : (353) 1 2317172
E-mail: info@hea.ie
Website: http://www.llp.ie

Italy

Agenzia Scuola – AS (Comenius-Grundtvig-Visite di Studio)
Via Magliabechi 1
I-50122 Firenze
Tel : (39) 055 238 03 48
Fax. : (39) 055 238 03 43
E-mail: agenziallp@indire.it
Website: http://www.programmallp.it

Istituto per lo Sviluppo della Formazione e dell'Orientamento Professionale dei
Lavoratori – ISFOL (Leonardo da Vinci)
Via G.B. Morgagni 33
I-00161 Roma
Tel: (39) 06 44 59 01
Fax: (39) 06 44 59 04 75
E-mail: leoprojet@isfol.it
Website: http://programmaleonardo.net/llp/index.asp

Latvia

Akadēmisko programmu agentūra – APA (Comenius-Erasmus-Grundtvig, Study
Visits)
Blaumana iela 28
LV-1011 Riga
Tel : (371) 728 01 38
Fax : (371) 728 01 08
E-mail: apa@apa.lv
Website: http://www.apa.lv

Valsts izglitibas attestibas agentura – VIAA (Leonardo da Vinci)
Valnu iela 1, 3. stāvs
LV-1050 Riga
Tel : (371) 781 43 22
Fax : (371) 781 43 44
E-mail: info@viaa.gov.lv
Website: http://www.viaa.gov.lv

Liechtenstein

Agentur für Internationale Bildungsangelegenheiten
Postplatz 2, Postfach 22
LI-9494 Schaan
Tel : (423) 236 7220
Fax : (423) 236 7224
E-mail: leonardo@llv.li
Website: http://www.aiba.llv.li

Lithuania

Education Exchanges Support Foundation
Gelezinio Vilko str.12
LT-01112 Vilnius
Tel : (370) 5 261 0592 / 5 249 7134
Fax : (370) 5 249 7137 / 7141
E-mail: info@smpf.lt
Website: http://www.smpf.lt

Luxembourg

Agence pour le Programme Européen d'Education et de Formation Tout au Long
de la Vie
ANEFORE a.s.b.l.
16 boulevard Royal
L-2449 Luxembourg
Tel: (352) 247 852 84
Fax: (352) 247 852 93
E-mail: info@anefore.lu
Website: http://www.anefore.lu

Malta

European Union Programmes Unit – EUPA
36, Old Mint Street
MT-Valletta VLT 1514
Tel: (356) 25586132
Fax: (356) 25586139
E-mail: eupu@gov.mt
Website: http://www.llp.eupa.org.mt

Netherlands

National Agency for Lifelong Learning
Kortenaerkade 11
NL-2518 AX's-Gravenhage
Tel: (31) 704 260 251
Fax: (31) 704 260 259
Website: http://www.na-lll.nl

Norway

Norwegian Centre for International Cooperation in Higher Education - Senter for Internasjonalisering av hojere utdanning – SIU
Vaskerelven 39 (PO Box 7800 N-5014 Bergen)
N-5020 Bergen
Tel: (47) 55 30 88 00
Fax: (47) 55 30 88 01
E-mail: siu@siu.no
Website: http://www.siu.no

Poland

Foundation for the Development of Education System
ul. Mokotowska 43
PL-00-551 Warsaw
Tel: (48) 22 622 3712
Fax: (48) 22 622 3710
E-mail: kontakt@frse.org.pl
Website: http://www.frse.org.pl

Portugal

Agencia Nacional do Programma "Aprendizagem ao Longo da Vida"
Av. Infante Santo, n° 2 - piso 4
PT-1350-178 Lisboa
Tel: (351) 21 3944760
Fax: (351) 21 3944737
E-mail: agencianacional@proalv.pt
Website: http://www.socleo.pt

Romania

National Agency for Community Programmes in the Field of Education and Vocational Training
133, Calea Serban Voda, 3rd Floor, 4th District
RO-040205 Bucharest
Tel: (402) 1.201.07.001
Fax: (402) 13113500
E-mail: agentie@anpcdefp.ro
Website: http://www.anpcdefp.ro

Slovakia

SAAIC - National Agency of the Lifelong Learning Programme
Staré grunty 52
SK-842 44 Bratislava
Tel : (421) 2 654 289 11
Fax : (421) 2 654 244 83
E-mail: llp@saaic.sk
Website: http://www.saaic.sk/iip

Slovenia

CMEPIUS - Centre of the Republic of Slovenia for Mobility and European Educational and Training Programmes
Ob železnici 16
SI-1000 Ljubljana
Tel : (386) 1 5864.251
Fax: (386) 1 5864.231
E-mail: info@cmepius.si
        maja.mihelic-debeljak@cmepius.si
Website: http://www.cmepius.si/

Spain

Organismo Autónomo Programas Educativos Europeos (OAPEE)
Paseo del Prado, 28 - 1a planta
E-28014 Madrid
Tel : (34) 91 506.56.85
Fax : (34) 91 506.56.89
E-mail: oapee@oapee.es
Website: http://www.oapee.es

Sweden

Internationella programkontoret för utbildningsområdet
Kungsbroplan 32A, 2 tr (Box 220 07)
SE-104 22 Stockholm
Tel: (46) 8 453 72 00
Fax: (46) 8 453 72 01
E-mail: registrator@programkontoret.se
Website: http://www.programkontoret.se/

Turkey

The Centre for EU Education and Youth Programmes
Huseyin Rahmi Sokak N°2, Cankaya
TR-06680 Ankara
Tel: (90) 312 409 6000
Fax: (90) 312 409 6009
E-mail: bilgi@ua.gov.tr
Website: http://www.ua.gov.tr

United Kingdom

British Council (Comenius)
10, Spring Gardens
UK-London SW1A 2BN
Tel: (44) 0161 957 7755
Fax: (44) 207 389 4426
E-mail: comenius@britishcouncil.org
Website: http://www.lifelonglearningprogramme.org.uk

British Council Wales (Erasmus)
28 Park Place
Cardiff
CF10 3QE
Wales
Tel: (44) 2920 397 418
Fax: (44) 2920 237 494

UK National Agency ECOTEC (Leonardo da Vinci, Grundtvig, Study visits)
28-34 Albert Street
UK-Birmingham B4 7UD
Tel: (44) 845 199 2929
Fax: (44) 121 616 3779
E-mail: llp@ecotec.com
Website: http://www.leonardo.org.uk

Republic of Croatia

Agencija za mobilnost i programme EU (Agency for Mobility and EU Programmes)
Gajeva 22
10 000 Zagreb
Tel: (385) 1 5005 635
Fax: (385) 1 5005 699
E-mail: info@mobilnost.hr
Website: http://www.mobilnost.hr

The former Yugoslav Republic of Macedonia

National Agency for European Educational Programmes and Mobility
Национална Агенција за Европски образовни програми и мобилност
Porta Bunjakovec, A2-1
MK –1000 Skopje
The former Yugoslav republic of Macedonia
Tel: (389) 2 3109 045
Fax: (389) 2 3109 043
E-mail: info@na.org.mk
Website: http://www.na.org.mk

Appendix 2

2009 Call: Application Form for

Multilateral Projects, Networks, Accompanying Measures and Comparative Research

This generic application form is used in the 2009 Call by all the centralised actions within the Comenius, Erasmus, Leonardo da Vinci and Grundtvig sub-programmes, and the Transversal Programme. The application form is an interactive PDF form that uses Adobe Acrobat Reader software. You will need to have installed on your computer version 8.1.3 or higher of Adobe Acrobat Reader.

Lifelong Learning Programme
Application Form

Validate form

Part A: Identification of the applicant and other organisations participating in the project.

Parts A and B must be completed separately by each organisation participating in the project.

A.1 Organisation

Partner number: P1

Role in the application: **Applicant**

Full name of the organisation*:

Full name of the organisation in Latin
characters (if applicable):

Acronym:

Department, if applicable:

Registered address:

Street*:   Number:

Post code*:   Town*:

Country*:   Region*:

Internet address:

Telephone 1*:   Telephone 2:   Fax:

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Education and Culture DG

Form version : 1.06 EN Adobe Reader version : 9

Education and Training

Validate form

A.2 Person authorised to represent the organisation in legally binding agreements (Legal representative)

Title*:

Family name*:

First name*:

_____   _____   _____

E-mail*:

_____

Role in the organisation*:

_____

Check this box if the address is different from
the address provided in section A.1   ☐

A.3 Person responsible for the management of the application (contact person)

Title:

Family name*:

First name*:

_____   _____   _____

Role in the organisation*:

E-mail address*:

_____   _____

Check this box if the address is different from
the address provided in section A.1   ☐

Telephone 1*:

Telephone 2:

Fax:

_____   _____   _____

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Education and Culture DG

Education and Training

Validate form

Part B. Organisation and activities

B.1 Structure

Status*:

Type of organisation*:

B.2 Aims and activities of the organisation

Please provide a short presentation of your organisation (key activities, affiliations etc...) relating to the domain covered by the project (Max. 1000 characters):*

Please describe the role of the organisation in the project (Max. 1000 characters):*

B.3 Other community grants

Details of projects in which your organisation, or where relevant, your department has participated with the financial support of Community Programmes or Initiatives in the past 3 years.

Programme or initiative	Reference number including year of award	Beneficiary Organisation	Title of the Project
Add a programme			

Other requests for a grant submitted by your organisation or,where relevant, the department responsible for the management of the application, for the same project. For each request, please identify the Community Programme concerned and the grant requested.

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Education and Culture DG

Form version : 1.06 EN Adobe Reader version : 9

Education and Training

Validate form

Programme concerned*	Grant requested*
Add a programme	

Details of other applications submitted under the Lifelong Learning Programme, in 2009, in which your organisation or group is involved

Sub-programme/action*	Acronym*	Applicant organisation*
Add a sub-programme		

☐ **Check this box if the Coordinating Organisation is different from the Applicant Organisation**

Add an organisation

List of partner organisations

Partner no	Role	Organisation Name	City	Country
P 1	APP			

Education and Culture DG

Education
and
Training

Part C. Description of the project

C.1 Summary of the project

For successful applications, this section will be reproduced, as presented below, in compendia etc. You should therefore ensure that it gives a concrete overview of the work your consortium plans to undertake including:
- *the reason for your project / network / study*
- *concise description of the outputs, results and / or products (including where relevant key pedagogical strategies, media used, language versions etc)*
- *the impact envisaged*

The abstract must be provided in English, French or German (Max. 2000 characters)*

C.2 List of deliverables

Deliverable N°	Title	Language version(s)*	Target Language(s)	Delivery Date*	Nature*	Dissemination level*

C.3 Lifelong Learning Programme Objectives and Priorities addressed

Please identify in the box below, which of the Objectives of the Lifelong Learning Programme this application addresses

Code*   Description

Describe briefly how your project addresses this Objective*

Add an objective

Please identify in the box below, which of the Specific Objectives of the Action this application addresses

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Lifelong Learning Programme
Application Form

Education and Culture DG

Education
and
Training

Form version : 1.06 EN Adobe Reader version : 9

Validate form

Code*   *Description*

Describe briefly how your project addresses this Objective (Max. 500 characters)*

Add an objective

Please identify in the box below, which of the Operational Objectives of the Action this application addresses

Code*   *Description*

Describe briefly how your project addresses this Objective*

Add an objective

Please identify in the box below, which of the Priorities this application addresses

Add a priority

Please identify in the box below, which of LLP Horizontal policies this application addresses

Add a policy

Please identify in the box below, how this application demonstrates Complementarity with other policies

Add an area of complementarity

C.4 Timing of the project

Please indicate the total duration of the project

Start month*:   Start year*:   End month*:   End year*:   Duration: 0

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Lifelong Learning Programme
Application Form

Education
and
Training

Form version : 1.06 EN Adobe Reader version : 9

Validate form

C.5 Budget

Expenditure		
Direct Costs		
Staff*		
Travel and subsistence*		
Equipment*		Cannot exceed 10% of direct costs
Subcontracting*		Cannot exceed 30% of direct costs
Other*		
Sub-Total Direct Costs	0	
Sub-total: Indirect costs*		Cannot exceed 7% of Total direct Costs
Total Cost	0	
Revenue		
Community Grant Requested*		
% of total cost		Cannot exceed 75% of Total Cost
Own funding of the members of the consortium*		
Other sources of financing*		
Total Co-financing	0	
Total revenue	0	Must equal total costs above

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Lifelong Learning Programme
Application Form

Education
and
Training

Validate form

Form version : 1.06 EN Adobe Reader version : 9

Education and Culture DG

C.6 Profile of the consortium

Countries involved in the proposal						
	All partners from eligible countries					Other participants involved in the proposal
	MS *	ACC *	AC *	OCT *	TOTAL	
N° of participants					0	
N° of countries					0	

Organisation Types							
Associations*	Counselling*	Education*	Enterprise*	Not for profit*	Public bodies*	Other types*	TOTAL
							0

C.7 Summary of work packages

Work package N°	Type of work package	Title of work package	Start	End

C.8 Associated projects

If your proposal is based on the results of one or more previous projects / networks, please provide precise references to this / these project (s) / network(s) in the table below.

Add an associated project

C.9 Linkages with other Actions in the LLP and EU-wide initiatives

The content of this application is linked to the following areas of the LLP. Tick all boxes relevant to this proposal: multiple choice possible.

Transversal policies
◯ Language learning/teaching
◯ Exploiting ICT in learning
◯ Dissemination and exploitation of results

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Lifelong Learning Programme
Application Form

Validate form

Sub-programme areas
◯ School education
◯ Higher education
◯ Adult education
◯ Vocational training
Future Europe-wide initiatives
◯ European Year of Creativity and Innovation (2009)
◯ European Year for combating poverty and social exclusion (2010)

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Validate form

Part D. Technical Capacity

D.1 To be completed by each organisation involved in the consortium / network including Applicant and Coordinating Organisations

Skills and expertise of key staff involved in the project / network

Partner number: P 1

Organisation name:

Name*

Summary of relevant skills and experience, including where relevant a list of publications related to the domain of the project (Max. 750 characters)*:

Add a new skills and expertise row

D.2 Identify, where relevant, specific tasks that will be sub-contracted to bodies outside the formal consortium (Max. 1000 characters):

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Education and Culture DG

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Part E. Project implementation / Award criteria

This section provides applicants with an opportunity to provide experts with statements in support of their application, as described in the other sections of this form, according to the award criteria against which they will be judged. More details on these criteria can be found in the Call for Proposals and on the Agency website.

E.1 Relevance (Max. 2000 characters)*

E.2 Quality of the Work Programme (Max. 2000 characters)*

E.3 Innovative Character (Max. 2000 characters)*

E.4 Quality of the Consortium (Max. 2000 characters)*

E.5 European Added Value (Max. 2000 characters)*

E.6 The Cost-Benefit Ratio (Max. 2000 characters)*

E.7 Impact (Max. 2000 characters)*

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Education and Culture DG

Education and Training

E.8 Quality of the Valorisation Plan (Dissemination and Exploitation of Results) (Max. 2000 characters)*

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Education and Culture DG

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Part F. Workplan in workpackages

F.1 Identification

Workpackage Number*   Workpackage type*

Work package title*

Start (month number)*   End (month number)*   Duration (in months):   0

Description of workpackage (Max. 2000 characters)*

F.2 Deliverables – outputs / products / results

Deliverable number*

Title*

Type of outcome / product / results*

Delivery Date*   Dissemination level*

Nature*

Language Version(s)*

| Bulgarian | Add >> | | Clear languages |

Target language(s)

| Bulgarian | Add >> | | Clear languages |

Description (Max. 500 characters)*:

Add a deliverable – output / product / result

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Education and Culture DG

Education and Training

F.3 Consortium partners involved

Lead partner:

Partner number*　[　▼　]　Country [////////////]　Short-name [////////////]

Role and tasks in the workpackage (Max. 400 characters)*

Add a partner

F.4 Resources required to complete workpackage

Indicative input of consortium staff: The totals provided for staff days should correspond globally with the staff table in the detailed budget.

| | Partners involved | Country | Short name | Number of staff days | | | | |
				Cat. 1	Cat. 2	Cat. 3	Cat. 4	Total
Lead partner	/////	/////	/////					0
Total								0

Tasks that will be subcontracted

Partner responsible for Sub-contract*	Country	Short name	N° days (where appropriate)	Brief description of task
Add a task				

Explanation of workpackage expenditures

Please explain and justify budget items included in the detailed budget that relate to this workpackage, specifically, where relevant under the headings: "travel and subsistence (of the staff of the consortium)", "equipment" and "other" (Max. 2000 characters)

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Validate form

Add a workpackage

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Lifelong Learning Programme
Application Form

Education and Culture DG

Education and Training

Validate form

Attachments

Declaration of Honour

Attach a document

Budget

Attach a document

Legal entity of the applicant organisation

Attach a document

☐ **List of associated partners**

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Submit this form

000000000

Submission number

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Appendix 3

ETUI Education services supporting transnational project work

Since 1992, ETUCO - and now more recently ETUI Education - has offered a range of services concerned with transnational projects and project management for trade unions. These services comprise a combination of online and offline facilities, designed to support European trade union officers involved in transnational projects and to increase the potential for transnational collaboration on trade union activities. The EU Information Service (shortly to be relaunched as 'SETUP'), is a 'one-stop shop' on European projects and funding, available on the ETUI Education web site at:

http://www.etui.org/education/EU-Information-Service

The facilities include:

— **Updated information about EU grants for trade union development**. This section includes information on EU Programmes and budget lines, structured according to areas of interest to trade unions; a list of open Calls for Proposals and Calls for Tender; and a newsletter, Trainers' Digest (shortly to become 'SETUP News'), published on an occasional basis and highlighting particular Calls for Proposals and other funding opportunities offering support to trade unions. The newsletter is available on the web site and by e-mail.

— **The Publications section** offers specific tools to help trade unionists with designing and managing European projects. These include the following handbooks which are downloadable from the web site:

  – **Trade Unions and Transnational Projects**: A guide to managing European trade union projects, with particular reference to trade union education. The updated version is available only in English and French, but ETUI Education is able to help confederations to translate it into their national language by covering 50% of their costs.

  – **The European Social Fund 2007-2013**: A handbook for trade unions. Produced in collaboration with the ETUC, this provides information on the new structure of the European Social Fund. It is available in English, French, German, Greek, Italian, Portuguese and Spanish, as well as in the languages of all the New Member States.

  – **The Lifelong Learning Programme**: A handbook for trade unions. The text of this handbook, produced in collaboration with the ETUC, is updated periodically and is currently available in English and French.

— **Transnational training courses** on:

- Project management. These are normally organised twice a year and are intended for trade union officers who already have some experience of transnational project work.

- The Social Dialogue budget lines and on the European Social Fund. These are organised in cooperation with the ETUC.

- EU funding for health and safety activities. These courses are organised in cooperation with the ETUI Health and Safety Department and the ETUC.

For dates of forthcoming courses, see:

http://www.etui.org/education/Courses/Calendar

— **Advice and assistance through:**

- **Help Desk**. (Currently under construction).

- **Information Days**. The EUIS Education Officer, Silvana Pennella, is available to organise Information Days for national confederations and for European industry federations.

- **Individual Advice**. Silvana Pennella can also provide individual advice on fundraising, preparing project applications, organising transnational partnerships and managing European projects.

For more details on any of these services, please contact Silvana Pennella (spennell@etui.org).

Bibliography

The Bibliography provides sources for additional reading, grouped under a series of topic headings.

Key Lifelong Learning Programme documents

Decision No 1720/2006/EC of the European Parliament and the Council of 15 November 2006 establishing an action programme in the field of lifelong learning. Brussels, European Union, 2006.

This is the legislation establishing the Lifelong Learning Programme and setting out its objectives, organisational structure and budget.

http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_327/l_32720061124en00450068.pdf

Lifelong Learning Programme (LLP) Guide 2009: Part I – General Provisions. Brussels, Commission of the European Communities, 2008.

This provides an overview of the LLP and includes information on the submission and selection process and on the requirements for dissemination and exploitation. It also includes detailed information on financial rules and regulations.

http://ec.europa.eu/education/llp/doc/call09/part1_en.pdf

Lifelong Learning Programme (LLP) Guide 2009: Part II – Sub-Programmes and Actions. Brussels, Commission of the European Communities, 2008.

This sets out details of each of the sub-programmes, providing information on their Specific and Operational Objectives, who can participate and what kinds of activity are supported. It is downloadable from:

http://ec.europa.eu/education/llp/doc/call09/part2_en.pdf

Lifelong Learning Programme (LLP) Guide 2009: Part II – Explanations by Action. Brussels, Commission of the European Communities, 2008.

A series of detailed information sheets, one for each individual action within the LLP, downloadable from:

http://ec.europa.eu/education/llp/doc/call09/fiches_en.pdf

Lifelong Learning Programme: General Call for Proposals 2008-2010: Update 2009 – Strategic Priorities. Brussels, Commission of the European Communities, 2008.

This document sets out the priorities for the programme for the period 2008-10 and is downloadable from:

http://ec.europa.eu/education/llp/doc/call09/prior_en.pdf

Lifelong Learning Programme: Application Forms

The Application Forms for LLP actions under the centralised application process are available from the EACEA web site:

http://eacea.ec.europa.eu/llp/funding/2009/call_lifelong_learning_2009.htm

For Application Forms for LLP decentralised actions that are administered by the National Agencies, please consult the list in Appendix 1.

Leonardo da Vinci Programme

Leonardo da Vinci Programme: The European Programme for Vocational Education and Training. Brussels, Commission of the European Communities.

The home page of the Leonardo da Vinci Programme within the Lifelong Learning Programme.

http://ec.europa.eu/education/programmes/llp/leonardo/index_en.html

Leonardo da Vinci Thematic Monitoring Activities. Brussels, Commission of the European Communities.

Monitoring of projects and exchange of information on five key themes.

http://eacea.ec.europa.eu/static/en/leonardo/entrance.htm

50 Success Stories: Leonardo da Vinci Community Programme. Luxembourg: Office for Official Publications of the European Communities, 2006.

Case study reports of successful Leonardo da Vinci projects.

http://ec.europa.eu/dgs/education_culture/publ/pdf/leonardo/success-stories_en.pdf

Leonardo da Vinci Success Stories: Europe Creates Opportunities. Luxembourg: Office for Official Publications of the European Communities, 2007.

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Mobility Creates Opportunities: Leonardo da Vinci Success Stories. Luxembourg: Office for Official Publications of the European Communities, 2008.

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Creativity and Innovation: Leonardo da Vinci Success Stories. Luxembourg: Office for Official Publications of the European Communities, 2009.

More case study reports of successful Leonardo da Vinci projects.

http://ec.europa.eu/dgs/education_culture/publ/pdf/leonardo/creativity_en.pdf

Leonardo da Vinci Programme: Databases. Brussels, Commission of the European Communities.

Databases with details of Leonardo da Vinci projects selected in previous years.

http://ec.europa.eu/education/programmes/llp/leonardo/data_en.html

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Grundtvig Programme

Grundtvig: European Cooperation in Adult Education. Brussels, Commission of the European Communities.

The home page of the Grundtvig Programme within the Lifelong Learning Programme.

http://ec.europa.eu/education/programmes/llp/grundtvig/index_en.html

Grundtvig Success Stories: Europe Creates Opportunities. Luxembourg: Office for Official Publications of the European Communities, 2007.

Case study reports of successful Grundtvig projects.

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Creativity and Innovation: Grundtvig Success Stories. Luxembourg: Office for Official Publications of the European Communities, 2009.

More case study reports of successful Grundtvig projects.

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Grundtvig Programme: Databases. Brussels, Commission of the European Communities.

Databases with details of Grundtvig projects selected in previous years.

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European Union Education and Training Policy

General

Education and Training: General Framework. Brussels, Commission of the European Communities.

The European Commission's web site provides summaries of key legislation and policy documents.

http://europa.eu/legislation_summaries/education_training_youth/general_framework/index_en.htm

Teaching and Learning: Towards the Learning Society, Brussels, Commission of the European Communities, 1995.

One of the first major statements on education and training by the European Commission. Based on a notion of lifelong learning and a 'learning society'.

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An overview of the European Council meeting which agreed the Lisbon Strategy for the development of a new 'knowledge society'. The Lisbon Strategy has provided the framework for all subsequent developments in economic and education policy.

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Making a European Area of Lifelong Learning a Reality. Brussels, Commission of the European Communities, 2001.

This remains a key statement of EU policy in the field of lifelong learning.

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The work programme agreed at the Barcelona Council meeting in 2002, setting out specific objectives and indicators, known as the *Education and training 2010 work programme.*

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This document refines the indicators set out in the *Education and Training 2010 work programme.*

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2008 joint progress report of the Council and the Commission on the implementation of the 'Education & Training 2010' work programme - "Delivering lifelong learning for knowledge, creativity and innovation". Council of the European Union, Brussels 2008.

The most recent report on the ET2010 work programme.

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This brochure introduces the new reference tool, based on eight key competences, to be adopted by all Member States in planning education and training.

http://ec.europa.eu/dgs/education_culture/publ/pdf/ll-learning/keycomp_en.pdf

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The Communication from the Commission reviewing the Education and Training 2010 work programme and proposing its extension.

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A strategic framework for European cooperation in education and training ("ET 2020"). Brussels, Council of the European Union, 2009.

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http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/educ/107622.pdf

EVE Database. Brussels, Commission of the European Union.

EVE is a new electronic platform for the dissemination and exploitation of results of projects supported by programmes implemented by DG Education and Culture.

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Knowledge System for Lifelong Learning. Brussels, Commission of the European Union.

This is an online support mechanism for the Education and Training 2010 Work Programme, offering up-to-date, comparable information on national policy initiatives and practices in prioritised areas in the field of Education and Training for the development of lifelong learning.

http://www.kslll.net/Default.cfm

Vocational Education and Training

The Copenhagen Declaration. Brussels, Commission of the European Communities, 2002.

This declaration from the European Ministers for Vocational Education and Training, the Social Partners and the European Commission established the basis for enhanced cooperation on vocational training between Member States, including measures to improve the transparency and recognition of qualifications. This initiative has since become known as 'The Copenhagen Process'.

http://ec.europa.eu/education/pdf/doc125_en.pdf

Maastricht Communiqué on the Future Priorities of Enhanced European Cooperation in Vocational Education and Training. Brussels, Commission of the European Communities, 2004.

A communication from the European Ministers for Vocational Education and Training, the Social Partners and the European Commission, reviewing progress on the Copenhagen Process.

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http://europass.cedefop.europa.eu/europass/preview.action

New Skills for New Jobs: Anticipating and matching labour market and skills needs. Brussels, Commission of the European Union, 2008.

This Communication from the Commission presents a first assessment of future skills requirements up to 2020, looking at long-term trends in job creation and labour supply and at trends in skills needs and occupations.

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Establishment of the European Credit system for Vocational Education and Training (ECVET). Brussels, Commission of the European Union, 2008.

The final Recommendation on the establishment of the ECVET system.

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European Centre for the Development of Vocational Training: CEDEFOP. Thessaloniki, Commission of the European Union.

CEDEFOP is an EU Agency specialising in the development of VET. Its web site contains useful policy documents and background papers.

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Adult learning: It is never too late to learn (COM (2006) 614). Brussels, Commission of the European Communities, 2006.

A Communication from the European Commission on policy in the field of adult education.

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Action Plan on Adult Learning: It's Always a Good Time to Learn (COM (2007) 558). Brussels, Commission of the European Communities, 2007.

An action plan proposed by the Commission to address the low participation of adults in lifelong learning.

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Promoting Language Learning and Linguistic Diversity: An Action Plan 2004 – 2006 (COM (2003) 449). Brussels, Commission of the European Communities, 2004.

This Communication from the Commission sets out policy on language learning, together with a targeted action plan.

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A New Framework Strategy for Multilingualism (COM (2005) 596). Brussels, Commission of the European Communities, 2005.

This Communication sets out a strategy to help all citizens acquire competence in at least two languages other than their mother tongue.

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Multilingualism: an asset for Europe and a shared commitment (COM (2008) 566). Brussels, Commission of the European Communities, 2008.

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e-Learning: Designing Tomorrow's Education (COM(2000)318). Brussels, Commission of the European Communities.

A Communication from the European Commission, setting out the role of e-Learning in delivering the Lisbon Strategy.

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Designing Tomorrow's Education: Promoting Innovation with New Technologies (COM(2000)23). Brussels, Commission of the European Communities, 2000.

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Council Resolution on e-Learning. Brussels, Commission of the European Communities, 2006.

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elearningeuropa.info. Brussels, Commission of the European Communities.

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http://www.elearningeuropa.info/main/index.php?page=home

Mobility

Commission's Action Plan for skills and mobility (COM(2002)72). Brussels, Commission of the European Communities, 2002.

This Communication addresses the need to increase occupational mobility from the poorer to the wealthier areas of the EU and sets out various measures to improve the situation, including measures to increase the transparency and recognition of qualifications.

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The Recommendation is concerned to enhance the quality of study periods abroad and sets out 10 principles to be embodied in a European Quality Charter for Mobility.

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European Trade Union Confederation: Education and Training Policy

'Lifelong Learning' in Our Priorities: ETUC Resolutions 2001. Brussels, European Trade Union Confederation, 2001.

This resolution was formulated in response to a Memorandum on lifelong learning from the European Commission. The policy framework that it outlines remains the ETUC's current position on lifelong learning.

http://www.etuc.org/IMG/pdf/CES-prioEN002-2.pdf

Framework of Actions for the Lifelong Development of Competencies and Qualifications. Brussels, European Trade Union Confederation, Union of Industrial and Employers' Confederations of Europe, and European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest, 2002.

The 'Framework' is a joint statement by the three main European Social Partners on the importance of lifelong learning. It commits them to working together on the development of competences and the acquisition of qualifications, as major aspects of lifelong learning.

http://www.etuc.org/a/580

Framework of Actions for the Lifelong Development of Competencies and Qualifications: Evaluation Report 2006. Brussels, European Trade Union Confederation, Union of Industrial and Employers' Confederations of Europe, and European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest, 2006.

This is the most recent of the annual reports produced by the European Social Partners on the actions carried out in the priority areas identified in the original 'Framework' document.

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A report on occupational mobility and the importance of access to education and training.

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Resolution on initial and continuous vocational training for a European employment strategy. Brussels, European Trade Union Confederation, 2009.

This resolution was adopted as a response to the two Communications from the European Commission: *An updated strategic framework for European cooperation in education and training* and *New Skills for New Jobs.*

http://www.etuc.org/a/6078

Project work

Trade Unions and Transnational Projects: A guide to managing European training projects (6th edition). Brussels, European Trade Union Institute for Research, Education and Health & Safety, 2007.

A guide to project work in a European context for trade unions. Includes a step by step guide to planning a project, as well as information on EU funding programmes.

http://www.etui.org/education/resources/trade_unions_and_transnational_projects_sixth_edition__1

SETUP news. Brussels, European Trade Union Institute

SETUP news (formerly Trainers' Digest) is an occasional publication, highlighting particular calls for proposals and other funding opportunities from EU programmes offering support for trade union education.

http://www.etui.org/education/News/Newsletters/SETUP-News

Guidance Notes. UK Leonardo National Agency.

The UK Leonardo National Agency has produced a number of helpful guides on different aspects of transnational project work, including *Dissemination Guidance Note for Leonardo Projects* (2002), *Evaluation Guidance Note for Leonardo Projects* (2002), *Valorisation Guidance Note for Leonardo Projects* (2004), *Transnational Partnership Guidance Note* (2004), *Recommendations for Financial Record Keeping* (2006) and *Learning Together – How to work effectively with partners* (2007). These can all be downloaded from the Agency website at:

http://www.leonardo.org.uk/page.asp?section=000100010023&sectionTitle=Useful+Documents+and+Information

Lifelong Learning

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A detailed study of adult education in Europe today, highlighting main trends and issues for the future, as well as presenting a set of recommendations. Undertaken as a contribution to the current EU discussions on lifelong learning.

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Report of the International Commission on the Development of Education ('The Faure Report'). A wide-ranging and hugely influential document which includes one of the earliest formulations of the concept of the 'learning society'.

Smith, M. K. 'Lifelong learning' in *the encyclopaedia of informal education,* 2007.

A useful survey of statements by key educational figures and the developing concept of lifelong learning.

http://www.infed.org/lifelonglearning/b-life.htm

Working Papers of the Global Colloquium Supporting Lifelong Learning, Milton Keynes UK, The Open University.

These papers form supporting material for an Open University Master's Module in Lifelong Learning. The collection contains papers on different aspects of Lifelong Learning, including both pedagogic methodology and public policy issues, all written by eminent researchers in the field.

http://www.open.ac.uk/lifelong-learning/papers/index.html

Glossary of Abbreviations and Acronyms and Terminology used in the Lifelong Learning Programme

The European Union uses many abbreviations, acronyms and terminology which can be very confusing. The Commission provides useful online information sources which help de-mystify some of the more general EU terminology and jargon. These can be found at

— http://europa.eu/abc/eurojargon/index_en.htm which provides a lexicon of 'eurojargon'

— http://europa.eu/scadplus/glossary/index_en.htm contains some 250 terms relating to European integration and the institutions and activities of the EU

— http://europa.eu/geninfo/info/guide/index_en.htm offers a page of links to other EU glossaries, information sources and contacts

— http://iate.europa.eu/iatediff/ provides a translation tool for finding equivalent terms in different EU languages.

In this glossary, as well as explanations of abbreviations and acronyms, we provide an explanation of some of the terms most commonly encountered within the LLP. Glossaries are also often found within EC documentation, for example in the 'Decision' document.

A

ACTION
A generic type of activity funded within a specific programme in the **Lifelong Learning Programme.**

ACTIVE CITZENSHIP
Cultural, economic political/democratic and/or social participation of citizens in society as a whole and in their communities.

ADULT LEARNER
Learner participating in adult education. In the context of the **Lifelong Learning Programme**, a person over 25 years of age or a younger person no longer participating in initial education.

APPLICANT ORGANISATION
The partner organisation legally responsible for a project application. If the application is approved, the Applicant Organisation becomes the **Beneficiary Organisation** and is legally responsible for its execution.

ASSESSMENT
General term embracing all methods used to appraise/judge the performance of an individual.

ASSOCIATED PARTNER
An organisation that will be contributing to the work of the project but is not formally a member of the project **consortium** and is not eligible to receive funding from the project budget.

B

BARCELONA COUNCIL
In March 2002, the European Council agreed that education was one of the bases of the European social model and that Europe's education systems should become a 'world quality reference' by 2010. It outlined a work programme with a series of detailed objectives achieve this goal.

BENCHMARKING
A standardised method for collecting and reporting critical operational data in a way that enables relevant comparison of performances of different organisations or programmes, often with a view to establish good practice.

BENEFICIARY/BENEFICIARY ORGANISATION
An individual or organisation that will benefit in various ways from the implementation of a project. In the European programmes, they are also often understood as the entities receiving financial grants. Also in financial terms, the organisation, institution or individual with whom the contract or grant agreement is signed and who is legally responsible for delivery of the project. (See also **Final Beneficiary**)

BUSINESSEUROPE
The Confederation of European Business – the representative body of enterprises and employers working in the private sector and a recognised participant in the **European Social Dialogue**. Formerly the Union des Industries de la Communauté européenne (**UNICE**).

C

CEDEFOP
European Centre for the Development of Vocational Training.

CEEP
European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest – the representative body for enterprises and employers working in the public services sector and a recognised participant in the **European Social Dialogue.**

CENTRALISED ACTION
An **action** within the **Lifelong Learning Programme** which is managed by the **Executive Agency**. Applications are made directly to Brussels.

CERTICATE/DIPLOMA
Official document, which formally recognises the achievements of an individual.

CIVIL SOCIETY
Third sector of society, alongside the state and the market, which includes institutions, groups and associations.

CLIL
Content and Language Integrated Learning (CLIL) involves learning which introduces students to new ideas and concepts in traditional curriculum subjects using a foreign language as the medium of communication.

COMENIUS
Originally an action within the **Socrates Programme**, Comenius is now a sectoral sub-programme within the Lifelong Learning Programme (2007-2013). It focuses on European cooperation in the field of pre-school and school education. (DG Education and Culture)

COMMERCIALISATION
The process of exploiting the products and services produced by a project on a commercial basis. The ownership, title and intellectual patent or property rights in the results of the project are vested in the contractor and may be shared with partners, subject to the terms of a partnership agreement. In addition, the contractor shall grant the **National Agency** and the **European Commission** the right to use the results produced or deriving from the project for dissemination or demonstration purposes. To help project coordinators understand this complex issue, the **European Commission** have set up an IPR Helpline, accessible at www.ipr-helpdesk.org.

COMPENSATORY LEARNING
The provision of learning which would normally have been acquired during compulsory schooling.

COMPETENCE
The capacity to use effectively experience, knowledge and qualifications.

CONNECT
Funding programme**,** launched in 1999, supporting innovative projects which reinforced synergies and links in the areas of education, training and culture, associated with new technologies. This area of work now forms part of the transversal programme on information and communication technologies within the **Lifelong Learning Programme**. (DG Education and Culture)

CONSORTIUM
The grouping of organisations that will be responsible for the direct implementation of a project. In the context of the **Lifelong Learning Programme**, it is a generic term applicable to both **Partnerships** and **Networks**.

COORDINATING ORGANISATION
The organisation within a project responsible for the overall leadership and day-to-day management. Normally this is also the **Applicant Organisation**, although the two roles may in some cases be handled by separate organisations.

COPENHAGEN PROCESS
Process of improving coordination and modernising national systems of **VET** in Europe. Takes its name from The Copenhagen Declaration issued by the Education Ministers of 31 European Countries, the **European Commission** and the **European social partners** in 2002.

CQAF
Common Quality Assurance Framework. **EU** framework for assuring quality in **vocational education and training.**

CSO
Civil Society Organisation.

D

DECENTRALISED ACTION
An action within the **Lifelong Learning Programme** which is managed by a **National Agency** designated by the national authority of the country concerned. Applications are made to the National Agency.

DECLARATION OF HONOUR
A legally binding declaration from the **Project Contractor** submitting a **project** application, acting as both a formal request for funding and as a warranty inter

alia that the information in the application is correct, and that the organisation has the capacity to carry out the project and is financially sound.

DELIVERABLE
A term used in project management to refer to the end result or **product** of a particular stage of the project's work, normally of a **workpackage**. Distinction is sometimes made between internal deliverables (i.e. which are for the benefit of the project team and are essential elements of the working process) and external deliverables which are final products to be presented to the project's external **stakeholders** and **beneficiaries**.

DIGITAL LITERACY
The capacity to use ICT proficiently.

D-G
Directorate-General of the **European Commission.**

DOMs
Départements Outre Mer – French overseas departments that are part of European Community territory (in contrast to **OCTs**).

DISSEMINATION
A planned process of providing information on the quality, relevance and effectiveness of the results of programmes and initiatives to key actors and stakeholders. It occurs as and when the results of programmes and initiatives become available.

DISSEMINATION AND EXPLOITATION PLAN
A plan for dissemination and exploitation that indicates those dissemination and exploitation activities that are going to be carried out during a project's lifetime (and possibly afterwards). A dissemination and exploitation plan is a requirement of all applications to the **Lifelong Learning Programme**.

E

EACEA
Education, Audiovisual and Cultural Executive Agency, a body jointly established by the European Commission's DG Education and Culture and DG Information Society and Media to manage certain parts of the **EU**'s programmes in the fields of education, culture and audiovisual.

EC
European Community.

ECVET
European Credit System for Vocational Education and Training – a European framework to support mobility and facilitate the transfer, validation and recognition of vocational education and training between different systems and countries. (DG Education and Culture)

EEC
European Economic Community, established by the **Treaty of Rome** in 1957.

EESC
European Economic and Social Committee - advisory body to the **European Council**, **European Commission** and **European Parliament**, representing the interests of the various social and economic groups, including employers and employees.

e-LEARNING
Learning that is aided by ICT.

e-LEARNING PROGRAMME (2004–2006)
EU programme aimed at improving the quality and accessibility of European education and training systems through the effective use of information and communication technologies. Effectively now replaced by the ICT activity of the Transversal Programme within the **Lifelong Learning Programme**. (DG Education and Culture)

EMPLOYABILITY
Capacity for people to be employed. It relates not only to the adequacy of their knowledge and competences, but also the incentives and opportunities offered to individuals to seek employment.

ENQA-VET
European Network on Quality Assurance in Vocational Education and Training.

EQARF
The European Common Quality Assurance Reference Framework for Vocational Education and Training (EQARF) is intended to serve as a reference instrument to help Member States to promote and monitor continuous improvement of their VET systems, based on common European references. (DG Education and Culture)

EQF
European Qualifications Framework – the proposed common European framework to describe learning outcomes, covering entire span of qualifications, both academic and vocational. (DG Education and Culture)

ERASMUS
Originally an EU action scheme for the mobility of university students. Now one of the sectoral sub-programmes within the **Lifelong Learning Programme**, with a focus on Higher Education. (DG Education and Culture)

ERC
European Research Council.

ERDF
European Regional Development Fund - one of the key **Structural Funds.**

ESF
European Social Fund – one of the key **Structural Funds**. Its focus is on employment, the development of human resources and the promotion of social integration. (DG Employment and Social Affairs)

ETUC
European Trade Union Confederation - the representative body for workers and trade unions at European level and a recognised participant in the **European Social Dialogue.**

ETUCO

European Trade Union College. Formerly the independent training body of the **ETUC**, it now forms part of the European Trade Union Institute (**ETUI**) and is known as **ETUI Education.**

ETUI

The European Trade Union Institute. Formerly the research body of the **ETUC**, it now also incorporates education and training, and health and safety**.**

ETUI EDUCATION
The education and training department of **ETUI**. Formerly **ETUCO.**

EU
European Union, established by the **Maastricht Treaty** in 1992. Currently comprises 27 Member States (Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom).

EURO
The official currency of 12 EU Member States.

EUROPA
Main web portal of the European Union, with links to other EU servers. URL: http://europa.eu.

EUROPASS
Single European framework for transparency and recognition of both formal and non-formal learning, including CV, Mobility (record of periods of training abroad), Diploma Supplement, Certificate Supplement and Language Portfolio. (DG Education and Culture)

EUROPEAN COMMISSION
The civil service of the EU, comprising 39 Directorates-General.

EUROPEAN COUNCIL
Highest decision-making body of the EU, comprising Presidents and Prime Ministers of the Member States.

EUROPEAN PARLIAMENT
Currently composed of 785 **MEPs**, elected by voters in the Member States for a period of 5 years.

EUROPEAN SOCIAL DIALOGUE
Consultation procedures involving the European social partners: **BUSINESSEUROPE, CEEP**, **ETUC** and **UEAPME**. It encompasses discussions, joint actions and sometimes negotiations between the European social partners, and discussions between the social partners and the institutions of the European Union.

EUROSTAT
Statistical office of the European Community.

EVALUATION
Evaluation (at project level) allows a qualitative and quantitative assessment of the results achieved against the aims (as regards activities/products).

Evaluation (at EU programme level) is defined as a judgement of interventions according to their results, impacts and the needs they aim to satisfy.

EWC
European Works Council – body for the information and consultation of workers in European scale enterprises. EU Directive 94/45/EC imposes this as an obligation on any undertaking with at least 1,000 employees within the Member States and at least 150 employees in each of at least two Member States.

F

FINAL BENEFICIARY (END BENEFICIARY)
A final beneficiary is an individual or an organisation directly and positively influenced by the outcome of a project. Not necessarily receiving a financial grant and possibly not directly involved in the project, the beneficiary may exploit project outcomes for its own purposes.

FOLLOW-UP ACTIVITIES

Follow-up activities take place after a project is finished in administrative terms. Their aim is to keep results alive and sustainable. They may include updating results, certifying the results, further take-up of results, transfer of results to another sector or target group or the commercialisation of the results.

FORMAL LEARNING

Learning typically provided by an educational or training institution, structured (in terms of learning objectives, outcomes, time or support) and leading to certification.

FP7

The Seventh Framework Programme for Research and Technological Development aims to encourage international cooperation and to strengthen the scientific and technological base of European industry and society. (DG Research)

G

GOOD PRACTICE

A good practice is an exemplary activity or process which has positively influenced systems and practices throughout its activities and results. Consequently, good practices are worth transferring and exploiting in different contexts and environments by new users or entities.

GRUNDTVIG

Originally one of the actions within the **Socrates Programme**, with a specific focus on adult education. Now one of the sectoral sub-programmes within the **Lifelong Learning Programme.** (DG Education and Culture)

GUIDANCE

A range of activities designed to assist people to make decisions about their lives (educational, vocational or personal).

I

ICT

Information and Communication Technologies.

ILO

International Labour Organization - specialised agency of the United Nations, dealing with labour issues and promoting equitable employment practices, workers' rights, social protection and **social dialogue.**

INFORMAL LEARNING

Learning resulting from daily life activities related to work, family or leisure. It is not structured (in terms of learning objectives, outcomes, time or support) and typically does not lead to certification.

INFORMATION SOCIETY

Distinctly European term, relating to the development and use of **ICT** applications and content within a social context that enables all citizens to participate in a knowledge-based and information-based economy and society.

INNOVATION

Innovative results are those which represent some new and distinctive features, distinguishing them from others with similar characteristics, and adding value in relation to conventional solutions.

INTERGENERATIONAL LEARNING
Learning that occurs through the transfer of experience, knowledge or competences from one generation to another.

IPR
Intellectual Property Right.

IST
Information Society Technologies.

IVT
Initial Vocational Training.

i2010 - A EUROPEAN INFORMATION SOCIETY FOR GROWTH AND EMPLOYMENT
EU framework for Europe's **information society** and media policy, to be achieved by 2010, with three priorities: creating a Single European Information Space, strengthening innovation and investment in **ICT** research and achieving an inclusive European information and media society. To be achieved through a variety of initiatives and programmes, including **eLearning**, eContentplus and **FP7**.

J

JEAN MONNET PROGRAMME
This programme aims to strengthen the development of bodies and institutions active in the field of European integration. Now part of the **Lifelong Learning Programme.** (DG Education and Culture)

K

KNOWLEDGE-BASED SOCIETY
A society whose processes and practices are based on the production, distribution and use of knowledge.

L

LEARNING COMMUNITY
A community that widely promotes a culture of learning by developing effective local partnerships between all sectors of the community and supports and motivates individuals and organisations to participate in learning.

LEARNING ORGANISATION
An organisation that encourages learning at all levels (individually and collectively) and continually transforms itself as a result

LEARNING REGION
A region in which stakeholders collaborate to meet specific local learning needs and implement joint solutions to common problems.

LEARNING SOCIETY
A society that widely promotes a culture of learning. See the European Commission Communication Teaching and Learning: Towards the Learning Society.

LEONARDO DA VINCI
Action Programmes on vocational training (1995-2006), supporting innovative transnational initiatives in **VET**. From 2007 to 2013, one of the four sectoral sub-

programmes within the **Lifelong Learning Programme**, with a specific focus on vocational training. (DG Education and Culture)

LETTER OF INTENT
A formal letter from a partner organisation within a project **consortium**, submitted as part of the application process and stating its agreement to participate according to the project plan and budget and to accept the financial and administrative conditions.

LIFELONG LEARNING
All learning undertaken actively throughout life, with the aim of improving knowledge skills and competences within a personal, civic, social and/or employment related perspective.

LIFELONG LEARNING PROGRAMME
A framework funding programme, organised by the EU Directorate-General for Education, Training and Youth, designed to foster innovation in and cooperation between education and training systems in participating countries at every stage of life. Currently running for seven years (2007-2013). It integrates the previously separate **Comenius**, **Erasmus**, **Leonardo da Vinci** and **Grundtvig** Programmes into a new framework and also includes transversal programmes on policy cooperation and integration, language learning, **ICT** and dissemination, as well as the **Jean Monnet Programme**. (D-G Education and Culture)

LINGUA
Actions within the Socrates Programme (1990-2006) promoting the teaching and learning of foreign languages in the EU. It is now replaced by the transversal programme on language learning within the **Lifelong Learning Programme**. (D-G Education and Culture)

LISBON STRATEGY/LISBON AGENDA
At its meeting in Lisbon in March 2000, the **European Council** set a new goal: to become, within a decade, 'the most competitive and dynamic knowledge-based economy in the world, capable of sustainable growth with more and better jobs and greater social cohesion'. The 'Lisbon Strategy' covers matters such as research, education, training, Internet access and on-line business. It also covers reform of Europe's social protection systems, which must be made sustainable so that their benefits can be enjoyed by future generations.

M

MAASTRICHT TREATY
The Maastricht Treaty, which came into force on 1 November 1993, introduced the concept of European citizenship, reinforced the powers of the European Parliament and launched the process of Economic and Monetary Union.

MAINSTREAMING
The process through which innovative activities and their results are transferred into general policy and practice.

MEMBER STATE
One of the (currently) 27 states that are members of the European Union.

MEP
Member of the European Parliament.

MILESTONE
Milestones provide the basis by which project implementation is monitored and managed. They are key events that provide a measure of progress and a target for the project team to aim at, including most frequently the date estimated for completion of an activity, a **workpackage** or a **deliverable**.

MINERVA

Action within the **Socrates Programme** (2000-2006) aiming to promote European cooperation on the use of **ODL** and **ICT** within education. Activities now subsumed within the information and communication technologies transversal programme of the **Lifelong Learning Programme**. (DG Education and Culture)

MOBILITY

Spending a period of time in another **Member State** in order to undertake study, work experience, or other learning or teaching activity or related administrative activity, supported as appropriate by preparatory or refresher courses in the host language or working language.

MULTILATERAL

A relationship involving more than two parties. Within the **Lifelong Learning Programme** used to refer to a Network or Project that involves partners from at least three **Member States**.

MONITORING

In relation to a **project**, monitoring involves continuous and systematic control of the project's progress. The intention is to correct any deviation from the operational objectives and thus improve the performance. Monitoring consists of supervision of activities, comparison with the work plan and using the information obtained for the improvement of the project.

N

NATIONAL AGENCY

Within the **Lifelong Learning Programme**, a body established within one of the **Member States** with the role of promoting the Programme and administering particular aspects, most notably **Mobility** and **Partnership** activities.

NEEDS ANALYSIS

In relation to a **project**, a needs analysis is often an integral part of preparation, taking place at the planning stage, before starting the project (ex ante needs analysis). The aim is to define the needs of a target group (future **beneficiaries** and users of the project results) and to better orientate the project's activities, with the objective of meeting those needs.

NETWORK

Formal or informal grouping of bodies active in a particular field, discipline or sector.

NICE TREATY

The Treaty of Nice, which came into force on 1 February 2001, provided for the institutional reform needed for EU enlargement with the accession of countries from eastern and southern Europe.

NON-FORMAL LEARNING

Learning that is not provided by an education or training institution and typically does not lead to certification. Unlike informal learning, it is structured in terms of learning outcomes, objectives, time and support

O

OCTs

Overseas Countries and Territories – countries and territories that are constitutionally linked to four of the **Member States** (Denmark, France, the Netherlands and the United Kingdom) and are not independent states. They are

not part of the EU (unlike the **DOM**) and Community legislation does not apply, unless specifically adopted.

ODL
Open and distance learning.

OJ
Official Journal. Also referred to as **OJEC** (Official Journal of the European Communities).

OUTCOME
The longer term impact of a **project**, generally assessed some time after the project's formal conclusion. (Cf **Result**)

P

PARTNERSHIP
A bilateral or multilateral agreement between a group of institutions or organisations in different **Member States** to carry out joint European activities. One of the recognised forms of action within the **Lifelong Learning Programme.**

PLACEMENT
In the context of the **Lifelong Learning Programme**, spending a period of time in an enterprise or organisation in another **Member State**, supported as appropriate by preparatory or refresher courses in the host language or working language, with a view to helping individuals to adapt to the requirements of the Community wide labour market, to acquiring a specific skill and to improving understanding of the economic and social culture of the country concerned in the context of acquiring work experience.

PMC
Project Management Committee.

PRODUCT
In project management, a term usually employed to refer to one of the tangible outputs of a **project**.

PROGRESS
The Progress Programme (2007-2013) is a framework programme which replaces previous individual Programmes in the fields of employment, social inclusion, working conditions and anti-discrimination. It supports the objectives of the **European Union** in the employment and social affairs area and thereby contributes to the achievement of the **Lisbon Strategy**, promoting more and better jobs and equal opportunities for all.

PROJECT
Cooperation activity with a defined outcome, developed jointly by a formal or informal grouping of organisations or institutions.

PROJECT CONTRACTOR
The organisation or institution responsible for submitting a **project** for funding, for signing the contract for funding and for carrying the legal and financial responsibility for its execution.

PROJECT COORDINATOR
The organisation or institution in charge of the implementation of a **project** by a multilateral grouping.

R

R & D
Research and Development.

RESULT
The initial impact of a **project**, generally assessed at the time of the project's formal conclusion. (Cf **Outcome**)

ROME, TREATY OF
The Treaty of Rome (March 1957) established the European Economic Community (**EEC**).

RTD
Research and technological development.

S

SDA
Social Development Agency – non-profit-making organisation supported by the **ETUC**. Works to extend international **social dialogue**, to carry out specific projects on social issues and to advise **EWCs** and workers' representatives.

SEVENTH FRAMEWORK PROGRAMME
Seventh Community Framework Programme for Research and Technological Development (2007-2013) (**FP7**). (DG Research)

SINGLE EUROPEAN ACT
The Single European Act (1986) revised the **Treaty of Rome** in order to add new momentum to European integration and to complete the internal market.

SINGLE MARKET
The European Single Market came into existence on 1 January 1993. Its aim is to ensure the free movement of people, goods, services and capital within the European Union.

SMEs
Small and medium-sized enterprises.

SOCIAL DIALOGUE
Social dialogue is defined by the **ILO** as including all types of negotiation, consultation or simply exchange of information between, or among, representatives of governments, employers and workers, on issues of common interest relating to economic and social policy. It can exist as a tripartite process, with the government as an official party to the dialogue or it may consist of bipartite relations only between labour and management (or trade unions and employers' organisations), with or without indirect government involvement. Concertation can be informal or institutionalised, and often it is a combination of the two. It can be inter-professional, sectoral or a combination of all of these. It can take place at national, regional company or European level (**European Social Dialogue**).

SOCIAL INCLUSION
When people can participate fully in economic, social and civic life, when their access to income and other resources (personal, family, social and cultural) is sufficient to enable them to enjoy a standard of living and quality of life that is regarded as acceptable by the society in which they live and when they are able fully to access their fundamental rights.

SOCIAL PARTNERS
Organisations participating in **Social Dialogue**.

SOCRATES PROGRAMMES
Community action Programmes (1995-2006) promoting European cooperation in the field of education, covering the whole range of education activities from pre-school to adult education and including actions such as **Comenius**, **Erasmus**, **Grundtvig**, **Lingua** and **Minerva**. From 2007 to 2013, these have been subsumed within the **Lifelong Learning Programme**. (DG Education and Culture)

STRUCTURAL FUNDS
Major EU funding programmes aiming to reduce disparities between different regions and **Member States** and to promote economic, social and territorial cohesion. They include the European Regional Development Fund (**ERDF**), the European Social Fund (**ESF**) and the Cohesion Fund. (DG Regional Policy)

SUSTAINABILITY
Sustainability is the capacity of a **project** to continue its existence and functioning beyond the end of the project period per se. The project **results** are used and exploited continuously. Sustainability of results implies use and exploitation of results in the long term.

STAKEHOLDERS
Individuals or institutions that may, directly or indirectly, positively or negatively, affect or be affected by a **project** and/or a programme. Examples of stakeholders in the activity field of education and culture include decision makers, **social partners** and sectoral organisations.

T

TARGET GROUP
The target group of a **project** is those who will be affected directly and positively by the project by its activities and its results.

THIRD SYSTEM AND EMPLOYMENT
The 'Third System' model is based on the delivery of goods and services which 'conventional' providers (the public and private sectors) either cannot provide, or find difficulty in providing, and which at the same time are capable of creating employment opportunities (e.g. welfare and home care services; recycling of waste products, particularly those where there is no effective commodity market; insulation and housing stock maintenance, particularly in social housing funded through public sources; demand for vacations and leisure from those with restricted mobility and low incomes, who need personal care service to be able to participate).

TRAINEE
A person undergoing vocational training either within a training institution or training organisation or in the workplace.

TRAINERS
Persons who, through their duties, are involved directly in the vocational education and training process.

TRANSFER OF INNOVATION
The aim of the innovation transfer process is the adaptation and/or further development of innovative results of a **project**, their transfer, piloting and integration into public and/or private systems, companies, organisations at local, regional, national and/or Community level. The process has the objective of answering the needs of new **target groups** and users.

U

UEAPME
European Association of Craft and Small and Medium-Sized Enterprises - the representative body of **SMEs** and a recognised participant in the **European Social Dialogue.**

UNICE
Union of Industries of the European Community - the representative body of enterprises and employers working in the private sector and a recognised participant in the **European Social Dialogue**. Since January 2007, known as **BUSINESSEUROPE.**

V

VALORISATION
'Valorisation' is the French term for **dissemination and exploitation** of results.

VET
Vocational Education and Training.

VETPRO
Professionals in Vocational Education and Training – a term used in relation to **Mobility** actions within the **Leonardo da Vinci** programme.

VOLL
Vocationally Oriented Language Learning (VOLL) is an approach to the teaching of a foreign language targeted on the professional needs of a specific vocational group.

W

WBS
See **Work Breakdown Structure.**

WORK BREAKDOWN STRUCTURE
A work breakdown structure (or **WBS**) breaks down the work of a **project** into smaller elements (**workpackages** and tasks). The WBS reflects the structure of how work on the project will be implemented and performed and in which costs and data will be summarised and reported.

WORKPACKAGE
A term used in project management which refers to the basic building block of a **work breakdown structure**. In most situations a workpackage can be thought of as a sub-project, comprising one or several tasks.

Y

YOUTH IN ACTION PROGRAMME
Community action programme (2007 – 2013) addressed to young people between 13 and 30, and aiming to inspire a sense of European citizenship among the youth of Europe. Organised in five operational actions, supporting exchanges, voluntary activities, networks, training and policy cooperation. Replaces former Youth for Europe (1995-1999) and Youth (2000-2006) Programmes. (DG Education and Culture)