



# **Lifelong Learning Programme (LLP)** ***Guide 2009***

## **Part I: General provisions**



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## Introduction

This Guide contains additional information complementing the annual Lifelong Learning Programme (LLP) Call for Proposals. Applicants are also invited to consult the websites of the Education, Audiovisual and Culture Executive Agency or the relevant National Agency (see section 1.E).

The Guide aims to:

- Help applicants to apply for funds and fill in the application forms;
- Help applicants to prepare an appropriate budget for their proposal;
- Clarify matters arising from the Call for Proposals;
- Provide practical information to which applicants may refer to at the various stages of the application and selection process.



## 1. GENERAL OVERVIEW OF THE LIFELONG LEARNING PROGRAMME (LLP)

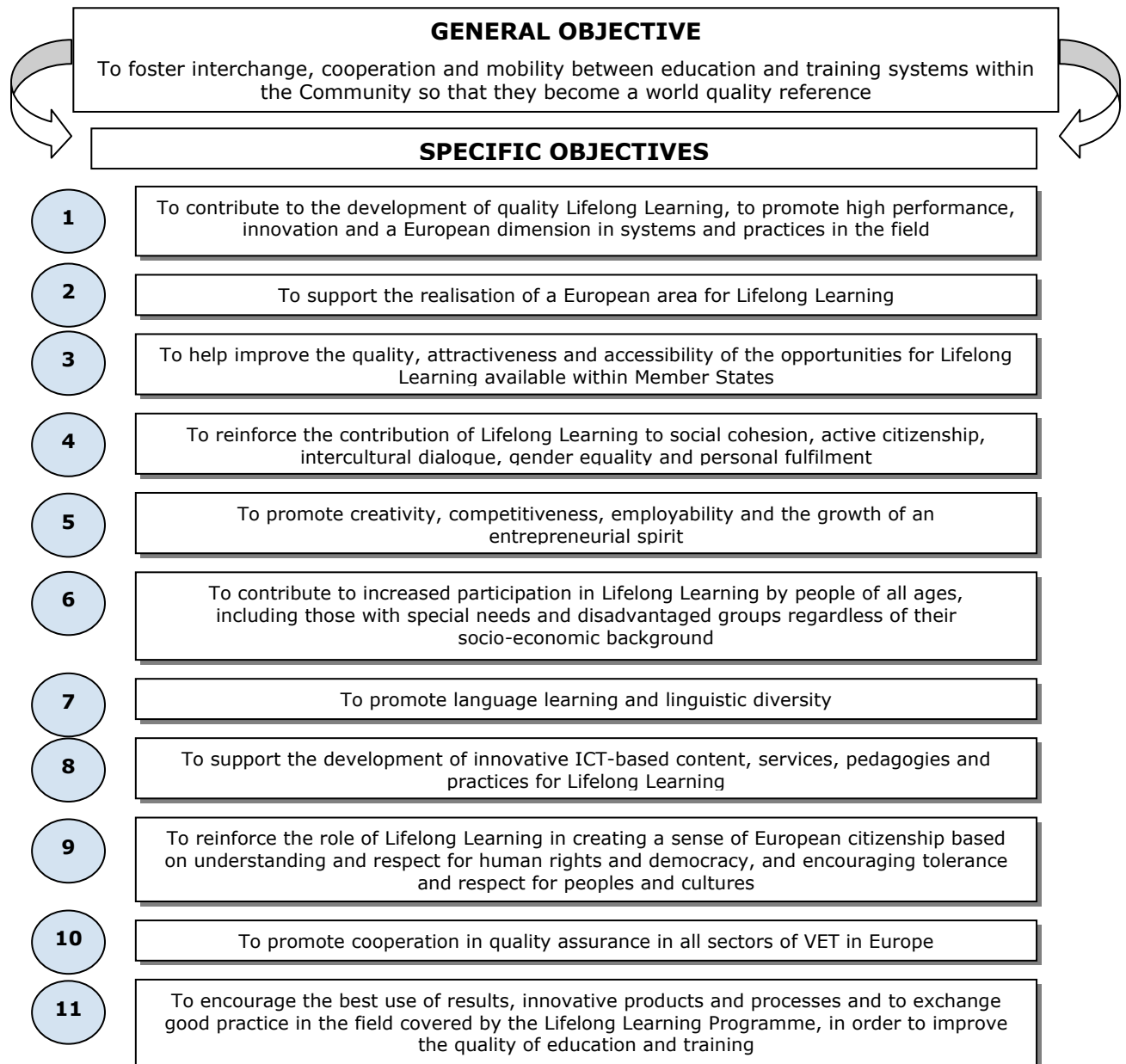
The **Programme for Community Action in the Field of Lifelong Learning** (the Lifelong Learning Programme – LLP)<sup>1</sup> aims to contribute through lifelong learning to the development of the EU as an advanced knowledge society, with sustainable economic development, more and better jobs and greater social cohesion. In particular, it aims to foster interchange, co-operation and mobility between education and training institutions and systems within the EU so that they may become a world quality reference. In this way, it addresses the modernisation and adaptation of education and training systems in the participating countries, particularly in the context of the strategic [Lisbon agenda goals](#), and brings European added value directly to individual citizens participating in its mobility and other co-operation actions.

The programme's specific objectives are mentioned below. They ensure that the LLP supports and supplements action taken by the Member States and other participating countries, while fully respecting their responsibility for the content of education and training systems and their cultural and linguistic diversity.

The **LLP** will run for seven years (2007-2013). The total budget for this period is EUR 6.970 million.

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<sup>1</sup> The programme was established by the Decision 1720/2006/EC of the European Parliament and of the Council of 15 November 2006, OJ L327 of 24/11/2006.



As indicated in Article 12 of the LLP decision, the programme should also contribute to furthering the horizontal policies of the EU, in particular by:

- (a) promoting an awareness of the importance of cultural and linguistic diversity within Europe, as well as of the need to combat racism, prejudice and xenophobia;
- (b) making provision for learners with special needs, and in particular by helping to promote their integration into mainstream education and training;
- (c) 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.

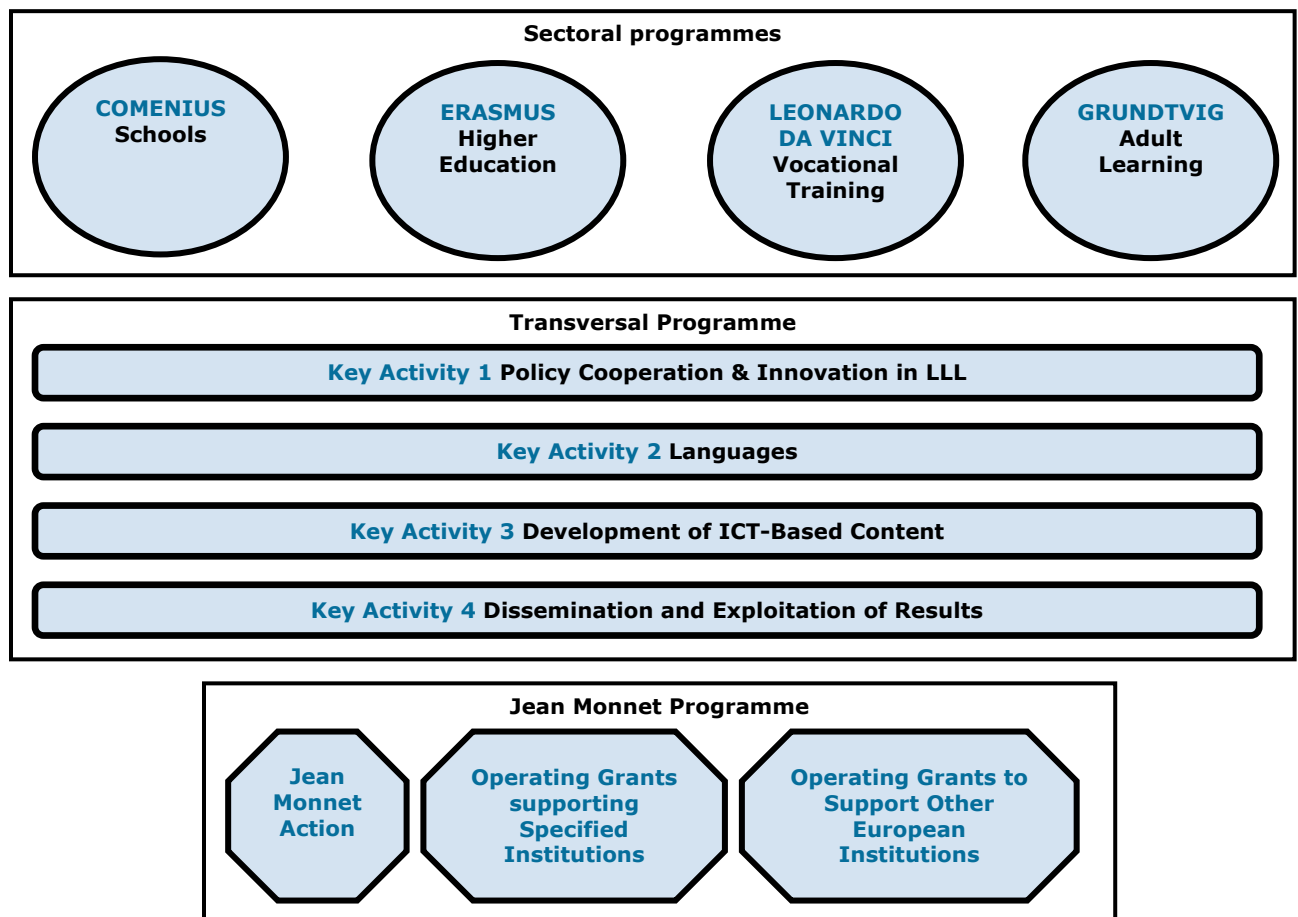


## 1.A. WHAT IS THE STRUCTURE OF THE PROGRAMME?

The Lifelong Learning Programme consists of:

- **four sectoral programmes** focusing on school education (Comenius), higher education (Erasmus), vocational training (Leonardo da Vinci) and adult learning (Grundtvig) respectively;
- **a Transversal Programme** targeted on cross-sectoral areas (policy cooperation and innovation in lifelong learning, languages, development of innovative ICT, dissemination and exploitation of results);
- a programme to support teaching, research and reflection on European integration and key European institutions and associations (**Jean Monnet Programme**).

### LLP Programme





<p><b>COMENIUS programme</b></p> <p><b>School Education</b></p>	<p>The Comenius programme focuses on the first phase of education, from pre-school and primary to secondary schools. It is relevant for all members of the education community: pupils, teachers, local authorities, parents' associations, non-government organisations, teacher training institutes, universities and all other educational staff.</p>
<p><b>ERASMUS programme</b></p> <p><b>Higher Education</b></p>	<p>Erasmus is the EU's education and training programme for mobility and cooperation in higher education across Europe. Its different actions not only address students wishing to study and work abroad, but also higher education teachers and enterprise staff intending to teach abroad and to higher education staff seeking training abroad. In addition, Erasmus supports higher education institutions to work together through intensive programmes, networks and multilateral projects as well as to reach out to the world of business.</p>
<p><b>LEONARDO DA VINCI programme</b></p> <p><b>Vocational Education and Training</b></p>	<p>The Leonardo da Vinci programme links policy to practice in the field of vocational education and training (VET). Projects range from those giving individuals the chance to improve their competences, knowledge and skills through a period abroad, to Europe-wide co-operation between VET stakeholders in order to enhance the attractiveness, quality and performance of VET systems and practices.</p>
<p><b>GRUNDTVIG programme</b></p> <p><b>Adult Learning</b></p>	<p>Addresses the teaching and learning needs relating to all forms of adult learning which are not of a predominantly vocational nature, as well as the institutions and organisations providing or facilitating any form of such learning opportunities for adults – whether of a formal, non-formal or informal nature – including those involved in the initial and in-service training of staff.</p>
<p><b>Key Activity 1</b></p> <p><b>Policy Cooperation &amp; Innovation in LLL</b></p>	<p>Policy co-operation and innovation actions: supports study visits for education and vocational training specialists, as well as studies and comparative research in these fields at European level. The main objectives are to support policy development and co-operation in lifelong learning and to ensure an adequate supply of comparable data, statistics and analyses.</p>
<p><b>Key Activity 2</b></p> <p><b>Languages</b></p>	<p>Linguistic diversity is a fact of life in Europe and it can encourage economic growth, personal development and inter-cultural dialogue. EU actions aim to promote language learning and the linguistic diversity in Europe.</p>
<p><b>Key Activity 3</b></p> <p><b>Development of ICT-Based Content</b></p>	<p>EU actions aim to harness the power of Information and Communications Technologies (ICT) to develop innovative education and training practices, improve access to lifelong learning and help develop advanced management systems.</p>
<p><b>Key Activity 4</b></p> <p><b>Dissemination and Exploitation of Results</b></p>	<p>In order to maximise their impact, activities and projects funded by the Lifelong Learning Programme, or previous programmes, should be made as widely known as possible to potential users. Therefore, it is necessary that each EU-funded project disseminates and exploits its own results.</p>



<b>Jean Monnet Action</b>	The Jean Monnet programme stimulates teaching, research and reflection on European integration at higher education institutions throughout the world. With projects across the five continents, the programme reaches up to 250 000 students every year.
<b>Operating Grants supporting Specified Institutions</b>	Grants are awarded to support certain operational and administrative costs of the following named institutions pursuing an aim of European interest: <ul style="list-style-type: none"> <li>- the College of Europe</li> <li>- the European University Institute</li> <li>- the European Institute of Public Administration</li> <li>- the Academy of European Law</li> <li>- the European Agency for Development in Special Needs Education</li> <li>- the International Centre for European Training (CIFE).</li> </ul>
<b>Operating Grants to Support Other European Institutions</b>	Grants may be awarded to support certain operational and administrative costs of European institutions or associations active in the field of education and training.

## 1.B. WHAT ACTION CATEGORIES ARE SUPPORTED?

The LLP supports the following **Action Categories**:

<u><a href="#">Charter</a></u>	A written document granted by the European Commission giving the possibility to the eligible higher education institutions to participate in Erasmus activities. The Charter outlines the fundamental principles an institution should adhere to in organising and implementing high quality mobility and cooperation and states the requisites it agrees to comply with in order to ensure high quality services and procedures as well as the provision of reliable and transparent information.
<u><a href="#">Certificate</a></u>	A certificate in mobility is the recognition of the capacity of an institution or a consortium to implement a mobility activity of excellent quality. These quality aspects cover the strategic framework in which the mobility activity is embedded (policy, strategy, work programme) as well as the operational and financial capacity of the institution to organise mobility activities. It is used in the Erasmus programme (Erasmus Consortium Placement Certificate) and in the Leonardo da Vinci programme (Leonardo da Vinci mobility certificate).



<a href="#">Mobility</a>	Spending a period of time in another participating country in order to undertake study, work experience, other learning, teaching or training activity or related administrative activity, supported as appropriate by preparatory or refresher courses in the host language or working language.
<a href="#">Bilateral</a> and <a href="#">multilateral partnership</a>	A bilateral or multilateral agreement between institutions / organisations in different participating countries to carry out usually smaller-scale European cooperation activities in their respective area of lifelong learning (school education, vocational training or adult learning).
<a href="#">Multilateral project</a>	A European cooperation activity with a defined and exploitable outcome developed jointly by a formal or informal grouping of organisations or institutions.
<a href="#">Multilateral network</a>	A formal or informal grouping of bodies active in a particular field, discipline or sector of lifelong learning, focussing on strategic reflections, needs analyses and networking activities in the field concerned.
<a href="#">Unilateral</a> or <a href="#">national</a> project	An activity with a defined and exploitable outcome developed by a single institution or in only one country.
<a href="#">Accompanying measures</a>	Support for various activities which, though not eligible under the main actions of the sectoral programmes, should clearly contribute to achieving the LLP's objectives.
<a href="#">Observation and analysis, studies and comparative research</a>	Projects focused on observation and analysis, for example in the form of studies or comparative research.
<a href="#">Operating grants</a>	Financial support to the regular operation of institutions and associations active in the field covered by the Lifelong Learning Programme.

Not all of these action types are available in every part of the programme.

### 1.C. WHICH COUNTRIES PARTICIPATE IN THE PROGRAMME?

The programme is open to:

- the 27 EU Member States<sup>2</sup>
- Iceland, Liechtenstein, Norway (the "EFTA-EEA countries", i.e. those which are members of the European Free Trade Association and also belong to the European Economic Area)
- Turkey
- "Overseas countries and territories" defined by Council Decision 2001/822/EC:
  - Greenland
  - New Caledonia and Dependencies

<sup>2</sup> Includes applicants from the following regions: Canary Islands, Guadeloupe, Martinique, French Guiana, Réunion, Azores, Madeira. Where specific financial provisions apply to the Overseas countries and Territories, these rules also apply to these regions.





- French Polynesia
- French Southern and Antarctic Territories
- Wallis and Futuna Islands
- Mayotte
- St Pierre and Miquelon
- Aruba
- Netherlands Antilles
- Anguilla
- Cayman Islands
- Falkland Islands
- South Georgia and the South Sandwich Islands
- Montserrat
- Pitcairn
- Saint Helena, Ascension Island, Tristan da Cunha
- British Antarctic Territory
- British Indian Ocean Territory
- Turks and Caicos Islands
- British Virgin Islands

There are on-going negotiations with Croatia, the Former Yugoslav Republic of Macedonia and Switzerland as regards their future participation in the LLP, which is subject to the result of these negotiations. Please consult the websites of the Commission, the National Agencies (NA) or the Education, Audiovisual and Culture Executive Agency (Executive Agency) for updates to the list of participating countries.

The **Jean Monnet Action** is open to higher education institutions and associations in all countries participating in the LLP as well as to any other ("third") country. Participating institutions and associations from third countries are subject to all the obligations and will fulfil all the tasks set out in the programme decision in relation to institutions and associations in the Member States.

## 1.D. WHO CAN PARTICIPATE?

The LLP is open to practically everybody who is involved in education or training:

- Pupils, students, trainees and adult learners
- Teachers, trainers and other staff involved in any aspect of lifelong learning (LLL)
- People in the labour market
- Institutions or organisations providing learning opportunities in any area of education or training
- The persons and bodies responsible for systems and policies concerning any specific aspect of LLL at local, regional and national level
- Enterprises, social partners and their organisations at all levels, including trade organisations and chambers of commerce and industry
- Bodies providing guidance, counselling and information services relating to any aspect of LLL
- Associations working in the field of LLL, including students', trainees', pupils', teachers', parents' and adult learners' associations
- Research centres and bodies concerned with education and training issues

- Not-for-profit organisations, voluntary bodies, non-governmental organisations (NGOs).

Please consult the specific sections of this Guide for information on who can participate in which part of the programme.

## 1.E. WHO DOES WHAT?

The **European Commission (Directorate General for Education and Culture)** is responsible for ensuring the effective and efficient implementation of the LLP as a whole. The Commission is assisted in this task by the [LLP Committee](#) which comprises representatives of the Member States and other participating countries and is chaired by the Commission.

The operational management of the programme is carried out by the Commission in close co-operation with National Agencies (NA) (one or more in each of the participating countries) and the Education, Audiovisual & Culture Executive Agency (Executive Agency) in Brussels.

**National Agencies (NA):** The national authorities of the participating countries have established [National Agencies](#) to facilitate the coordinated management of the so-called "**decentralised**" actions of the programme at national level.

The **National Authorities** monitor and supervise the National Agencies and provide assurance to the Commission on the proper management by the National Agencies of the European Communities funds for decentralised actions of the programme.

The National Agencies play a key role in the practical implementation of the programme, as they are responsible for publicising the programme at national level, contributing to the dissemination and exploitation of results, and in particular for the management of the whole project life-cycle of the decentralised programme actions at national level:

- the publication of any national calls for proposals or deadlines complementing the European Call for proposals on the LLP
- providing information on and promoting the programme actions, counselling potential applicants
- the reception, assessment and selection of grant applications
- taking the grant award decision for approved grant applications
- issuing Grant Agreements and payments to beneficiaries
- reception and treatment of contractual reports from beneficiaries
- monitoring and support to programme beneficiaries
- desk checks and on the spot control and audit of supported activities
- the dissemination and exploitation of results from supported activities
- analysing and providing feedback on the programme implementation and impact in their country.

**The "Executive Agency" in Brussels:** The mission of the **Education, Audiovisual and Culture Executive Agency** is to implement a number of "strands" of European Commission-funded programmes and actions in the fields of education and training, active citizenship, youth, audiovisual and culture. The programme strands managed by

the Executive Agency are all "centralised", in the sense that applications are submitted directly to Brussels rather than via an NA.

On the basis of the reference framework established by the Commission, the Executive Agency is responsible for implementing the following tasks:

- publication of specific calls for proposals and calls for tender
- receipt of grant applications and organising the assessment and project selection (whereby the grant award decision is taken by the Commission, after consultation of the LLP Committee and the European Parliament when required by the programme decision)
- issuing project Grant Agreements and making grant payments to beneficiaries
- reception and treatment of contractual reports from beneficiaries
- monitoring and support to programme beneficiaries
- desk checks and on the spot control and audit of supported projects.

**Cedefop (the European Centre for Development of Vocational Training) in Thessaloniki/Greece:** coordinates the study visits programme at EU level on behalf of the European Commission. The study visits programme is a part of the Transversal Programme, and one of the "**decentralised**" actions, in the sense that the applications are submitted to the National Agencies.



**European Commission ([Directorate General for Education and Culture](#))**

**[Executive Agency](#)**



**National Agencies<sup>3</sup>**



[AUSTRIA](#)



[BULGARIA](#)



[CZECH REPUBLIC](#)



[ESTONIA](#)



[FRANCE](#)



[GREECE](#)



[ICELAND](#)



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[TURKEY](#)

<sup>3</sup> Addresses and website links to the NAs can be found via the web address below



## 1.F. SOME BASIC TERMS

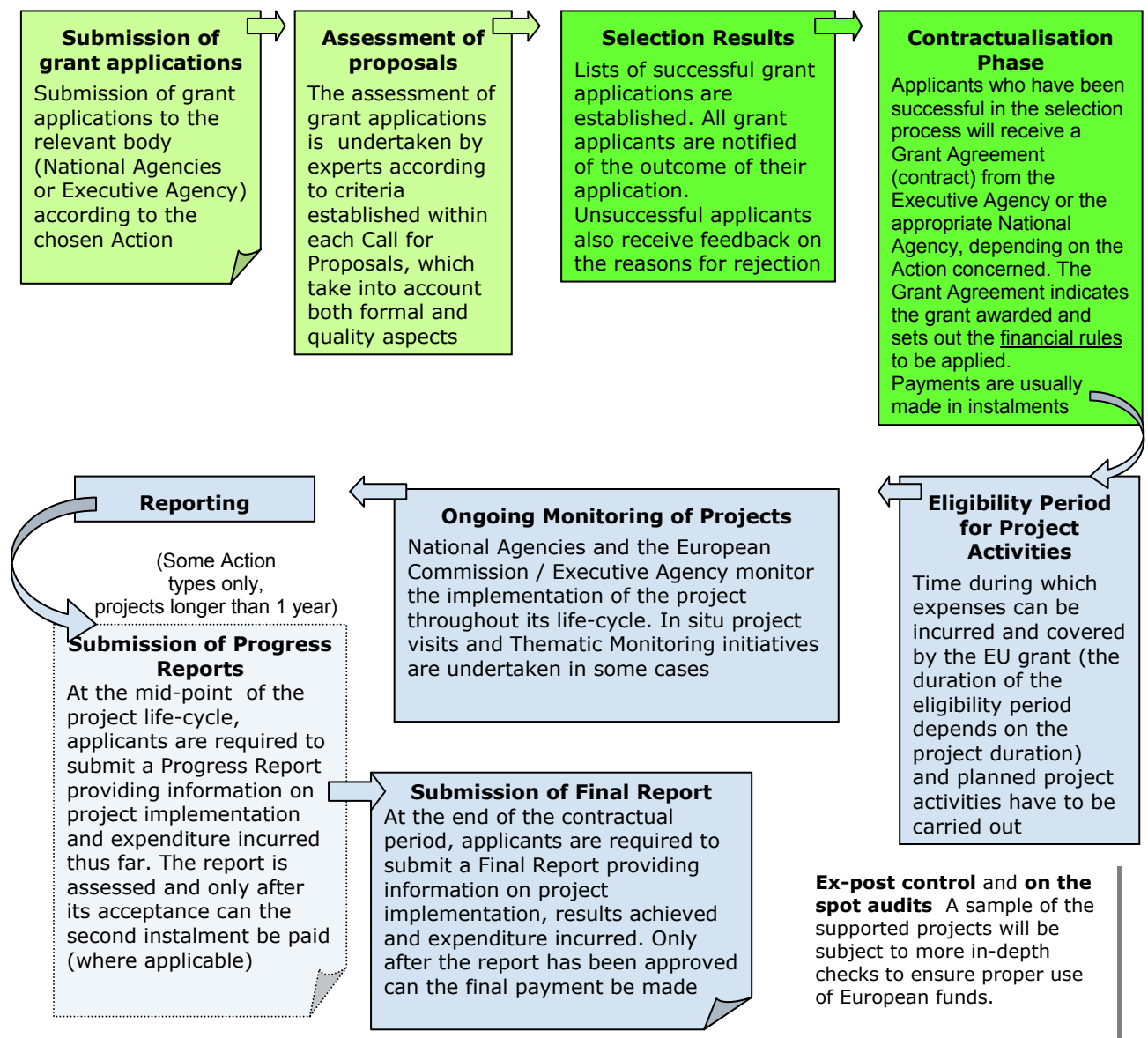
Before reading the following chapters you should have a look at the following definitions which are used throughout the whole document:

<b>Action</b>	A generic type of activity funded within a specific programme in the LLP (see section I.B above and Article 5 of the Decision establishing the LLP).
<b>Consortium</b>	A group of organisations or persons conducting a joint European cooperation Project, Partnership or Network.
<b>Coordinating Organisation</b>	The organisation within each Partnership, Project or Network responsible for overall leadership and day to day management of the project. The responsibilities of the Coordinating Organisation vary from Action to Action. In centralised Projects and Networks, the Coordinating Organisation is often also the Applicant Organisation.
<b>Applicant Organisation</b>	The partner organisation(s) legally responsible for an application. When an application is approved, the Applicant Organisation becomes the Beneficiary Organisation.
<b>Beneficiary</b>	In financial terms, the organisation, institution or individual with whom the "contract" (formally: "Grant Agreement") for receiving a grant is signed. In decentralised Partnership actions all participants in the Partnership become beneficiaries.
<b>Centralised action</b>	Action within the LLP which is managed by the Executive Agency.
<b>Decentralised action</b>	Action within the LLP which is managed by the National Agency designated by the national authority of the country concerned.
<b>Legal Representative</b>	The person within the Applicant Organisation who is legally authorised to represent the organisation in legally binding agreements. This person must sign both the grant application and the Grant Agreement in case the application is approved.



## 2. WHAT IS THE LIFE-CYCLE OF A PROJECT?

### 2.A. ADMINISTRATIVE CYCLE





## 2.B. FINANCIAL CYCLE

The financial cycle as outlined below applies to all Actions under the Lifelong Learning Programme, although some requirements are applicable only to particular types of Actions:

- (1) *submission of an estimated budget*: please consult the chapter on financial provisions to see what type of budgetary information is requested at grant application stage;
- (2) *assessment of the budget*: this is carried out on the basis of established and transparent criteria and may lead to a revision (correction / reduction) of the budget to ensure that it is eligible and includes only elements that are considered to be "necessary for the completion" of the proposed activity. The rules which apply when revising a budget are explained in the chapter on financial provisions;
- (3) *issuing the Grant Agreement ("contract")*
- (4) *payment procedures*: these refer – in chronological sequence – to aspects such as providing a financial guarantee (if any required for certain Beneficiary Organisations that are not public bodies), pre-financing arrangements, payment of the balance, recovery procedures, etc.;
- (5) *amendments to the agreement*: these are possible during project implementation. The relevant instructions are included in or provided with the Grant Agreement;
- (6) *reporting requirements*: these relate to the Progress Report (if applicable) and the Final Report. Instructions are provided with the Grant Agreement;
- (7) *financial control and audit requirements*: financial controls and on-the-spot audits may take place at any time up to 5 years after the final payment to or reimbursement by the beneficiary and the relevant documents must therefore be kept by the Beneficiary during this period.

## 2.C. APPLICABLE RULES

The rules outlined in this Guide apply to all Actions for which Community funding is available under the Lifelong Learning Programme.

The rules applicable to the administration and financing of the activities supported under the LLP are set out in the following documents:

- Decision No 1720/2006/EC of the European Parliament and of the Council of 15 November 2006 (establishing the Lifelong Learning Programme);
- Council Regulation (EC, Euratom) No 1605/2002 of 25 June 2002 on the Financial Regulation applicable to the general budget of the European Communities, modified most recently by Council Regulation (EC, Euratom) N° 1995/2006 of 13 December 2006;
- Commission Regulation (EC, Euratom) No 2342/2002 of 23 December 2002 laying down detailed rules for the implementation of Council Regulation (EC, Euratom) No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities, modified most recently by Commission Regulation No 478/2007 of 23 April 2007.

The Decision establishing the LLP takes precedence over the other applicable rules.

This Guide is to be read in conjunction with the text of the Call for Proposals and the grant application forms. In the event of any discrepancy between the texts, the order of precedence of documents in the context of the Call for Proposals is:

- (1) The Decision No 1720/2006/EC establishing the Lifelong Learning Programme;
- (2) The official announcement of the Call for proposals in the Official Journal of the European Union
- (3) The text of the Call as published on the LLP website of the Commission;
- (4) This LLP Guide
- (5) The application forms

**Deadlines for submission:** Each Action of the programme has its specific deadline. Please check the 2009 Call for proposals for the deadline of the Action you are interested in.

In some cases, notably centralised actions, the grant award procedure may be organised in two phases. In this case applicants will be asked to provide part of the information by the deadline for the first phase (such as information relating to the consortium, the project content and the budget) followed, in the second phase, by a request addressed only to short-listed applicants, to provide all remaining documentation (letters of intent, accounting and financial documentation etc.).

**Project life cycle:** The chapters per programme and Action of the Guide indicate, for each Action, the milestones from submission of the grant application to the starting date and maximum duration of the supported activity. Please note that these milestones are **indicative** at the time of publication of the 2009 Call for Proposals: any updates will be posted on the website of the relevant Agency. Nevertheless, the last update will be made at the latest 10 working days before the final date for submitting grant applications as set out in the present LLP Guide.

**Duration:** No applications will be accepted which relate to activities scheduled to run for a longer period than that specified in this Guide.

**End of the project:** If, after the signing of the Grant Agreement and the start of the project/activity, it becomes impossible for the beneficiary, for fully justified reasons beyond his/her control, to complete the project within the scheduled period, an extension to the eligibility period may be granted. However, the extension is not automatically guaranteed but subject to a case-by-case analysis. Furthermore, the extension of project duration cannot result in an increase of either the grant amount or the co-financing percentage.

**Eligibility period:** The period of eligibility for costs and activities starts and finishes on the dates indicated in the Grant Agreement. Under no circumstances can the eligibility period for costs and activities start before the date for submission of the grant application.





### 3. WHAT ARE THE SUBMISSION AND SELECTION PROCEDURES?

#### 3.A. PROCEDURE FOR SUBMITTING GRANT APPLICATIONS

##### Submission of the grant application

Grant applications for financial support under the decentralised actions of the Lifelong Learning Programme must be submitted to the National Agency of the country of the applicant. Grant applications for financial support under the centralised actions of the programme have must be submitted to the Executive Agency. The following table provides an overview of the application and grant award procedures.

##### National Agency Procedure 1 (NA1)

The following Actions, under which the grant award decisions are taken by the appropriate National Agencies, are managed through 'National Agency Procedure 1':

- **mobility** of individuals,
- **bilateral and multilateral partnerships,**
- **unilateral and national projects under the Transversal Programme<sup>4</sup>**

Under these Actions, grant applications are submitted to the National Agency designated by the national authority in the applicant's country. The National Agencies carry out the selection and allocate financial support to the applicants selected. The National Agencies award grants to beneficiaries located in their respective countries.

This procedure will also be followed in the case of applications for Erasmus and Leonardo da Vinci Certificates.

##### National Agency Procedure (NA2)

The following Action, under which the grant award decisions are taken by the Commission, but evaluation and contracting procedures are undertaken by the appropriate National Agencies, are managed through 'National Agency procedure 2':

- **multilateral projects: Transfer of Innovation (Leonardo da Vinci)**

Under this Action, grant applications are submitted to the National Agency of the country where the coordinator of the project is located. This National Agency carries out the evaluation of applications and submits to the Commission a shortlist of applications for approval. To avoid possible double funding of projects, the shortlists proposed by the different National Agencies are cross-checked before the Commission takes the grant award decision. Once the Commission has taken the grant award decision, the National Agencies award grants to selected project coordinators located in their respective

<sup>4</sup> Article 33 of the Decision



eligible/participating countries, who are then responsible for distributing the funds to all the partners participating in the projects.

### **Commission procedure (COM)**

The following Actions, under which project grant applications are submitted to the Executive Agency and the grant award decisions are taken by the Commission, are managed through the 'Commission Procedure':

- **unilateral and national projects** under the Jean Monnet Programme
- **multilateral projects and networks**
- **accompanying measures**
- **observation and analysis**
- **operating grants**

This procedure will also be followed in the case of applications for the Erasmus University Charter.

Applicants are normally informed of the receipt of their application within 30 days of the deadline for submission.

### **Instructions for proper submission**

1. Applications under all Actions must be submitted according to the instructions published by the relevant Agency (National Agency or Executive Agency).
2. For paper applications, compliance with the deadline will be checked using the postmark date. Thus, applicants are advised to obtain a receipt indicating the date of postage and the full sending address.
3. Applicants cannot make any changes to their grant application after the submission deadline.
4. Applications from organizations may only be submitted by legal bodies. They must contain the signature of a person legally authorised to represent that legal body (authorised signatory) in legal commitments.

### **Application forms**

These documents can be obtained, depending on the Action concerned:

- on the NA's website: [National Agencies per country](#)
- on the Executive Agency's website: [http://eacea.ec.europa.eu/llp/index\\_en.htm](http://eacea.ec.europa.eu/llp/index_en.htm).

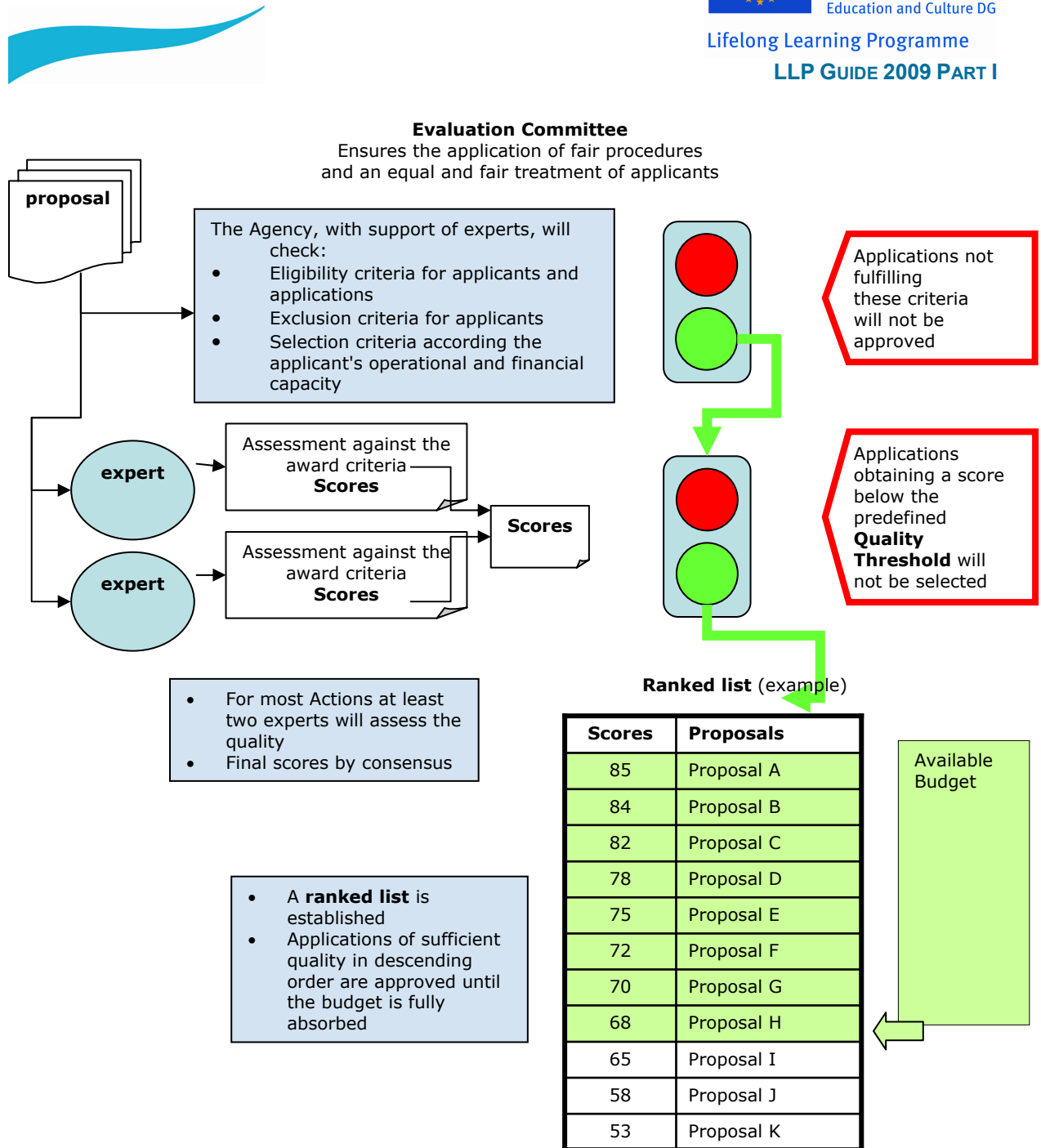


	<b>DECENTRALISED ACTIONS</b>		<b>CENTRALISED ACTIONS</b>
	<b>National Agency Procedure 1 - NA1</b>	<b>National Agency Procedure 2 - NA2</b>	<b>Commission Procedure - COM</b>
<b>Applicable to (typology of Action)</b>	<ul style="list-style-type: none"> <li>❖ Transnational mobility</li> <li>❖ Bilateral and multilateral partnerships</li> <li>❖ Unilateral and national projects (Transversal Programme)</li> </ul>	<ul style="list-style-type: none"> <li>❖ Multilateral Projects: Transfer of Innovation (Leonardo da Vinci)</li> </ul>	<ul style="list-style-type: none"> <li>❖ Multilateral projects and networks</li> <li>❖ Observation and analysis</li> <li>❖ Operating grants</li> <li>❖ Unilateral projects - Jean Monnet</li> <li>❖ Accompanying Measures</li> </ul>
<b>To whom the application has to be sent</b>	The appropriate <a href="#">National Agency of each applicant institution or individual</a>	The <a href="#">National Agency</a> of the coordinator of the grant application	The <a href="#">Education, Audiovisual and Culture Executive Agency</a>
<b>Main steps of the procedure</b>	<ul style="list-style-type: none"> <li>a. Assessment of proposals according to both formal (eligibility and exclusion criteria) and quality criteria (selection and award criteria which are defined within this Guide)</li> <li>b. Approval of the selection list by National Agency</li> <li>c. Allocation of financial grants to the selected beneficiaries by the National Agencies</li> </ul>	<ul style="list-style-type: none"> <li>a. Assessment of proposals according to both formal criteria (eligibility and exclusion criteria) and quality criteria (selection and award criteria) by the National Agency. Establishment of shortlist of the applications which it proposes to accept.</li> <li>b. Approval of the selection list by the Commission</li> <li>c. Allocation of financial grants to the selected proposals by the National Agencies</li> </ul>	<ul style="list-style-type: none"> <li>a. Assessment of proposals according to formal (eligibility and exclusion criteria) and quality criteria (selection and award criteria)</li> <li>b. Approval of the selection list</li> <li>c. Allocation of financial grants to the selected projects</li> </ul>

### 3.B. PROCEDURE FOR THE ASSESSMENT AND SELECTION OF APPLICATIONS

The grant award process involves a variety of actors: the Commission, the Executive Agency, the National Agencies, the Member States and participating countries and, through the relevant Programme Committee the national authorities in the Member States and other participating countries. In some cases, the European Parliament has the "right of scrutiny"<sup>5</sup> as regards the grant award decisions.

<sup>5</sup> For the Right of scrutiny of the European Parliament see article 8 of Decision 1999/468/EC.



The diagram shows the basic procedures involved in the assessment of applications.

### THE PANEL OF EXPERTS

For all programme Actions, except for individual mobility Actions, each grant application will normally be assessed by at least two experts. In most cases they will be external experts (that is experts external to the Agency organising the grant award procedure). They will undertake an assessment on the basis of a pre-determined scoring system and standardised checklists including qualitative aspects. The final score of a grant application is reached by consensus between the experts involved in the individual assessments.

Based on the expert assessment, the organising Agency establishes a **ranking list** of the grant applications, differentiating between applications proposed for approval, rejection and reserve list. The ranking list will include the grant amounts foreseen for those applications proposed for approval or reserve list. The reserve list of applicants may be used to award further grants in case funds become available following withdrawal of approved projects or following an increase in the programme budget (e.g. extra funds provided by the European Parliament).

In the case of multilateral Partnerships (Comenius, Leonardo da Vinci and Grundtvig), the evaluation of the application is organised by the NA of the coordinating country on the basis of common quality criteria used in all participating countries. National priorities (if applicable) are also taken into account.

#### **THE EVALUATION COMMITTEE**

The ranked lists of grant applications resulting from the assessment procedure as set out above are submitted to a so-called "Evaluation Committee". The size and composition of the Evaluation Committee varies between programmes and Actions. It can include Commission/Agency members as well as external experts and stakeholder representatives. The role of the Evaluation Committee is to supervise the overall assessment procedure, to guarantee the equal treatment of all applications through a fair and transparent application of the procedures and to make a grant award proposal to the person in charge of taking the grant award decision on the basis of the following:

- i. fair and transparent application of the published Eligibility, Selection, Exclusion and Award Criteria
- ii. coherent assessment and scoring
- iii. correct financial analysis (if applicable)
- iv. due assessment of additional information provided by external actors (such as National Agencies or European Commission Delegations in "third" countries participating in the programme) (if applicable)

#### and in accordance with

- v. the programme/Action objectives and priorities
- vi. the budget available.

#### **FINAL GRANT AWARD DECISION**

The formal decision process will vary depending on whether the grant award decision under the programme/Action concerned is subject to European Parliament scrutiny or not. If not, the decision will be taken directly by the competent National Agency (decentralised actions) or the Commission or the Executive Agency (centralised actions) on the basis of the grant award proposal made by the Evaluation Committee. For those programme actions for which the Programme Committee must be consulted, the process will also involve scrutiny (see above) by the European Parliament.

## Assessment criteria

Applications are assessed against four types of criteria:

- a. Eligibility criteria
- b. Exclusion criteria
- c. Selection criteria
- d. Award criteria.

### a. Eligibility criteria

Only applications that fulfil the formal eligibility criteria set out below will be considered for a grant.

#### GENERAL ELIGIBILITY CRITERIA

Applications must fulfil the following criteria:

1. Comply with the submission procedures set out in the relevant Call for proposals and in the section 3a, part "Instructions for proper submission" of this Guide;
2. Comply with the deadlines set out in the relevant Call for proposals. Indicative dates are given for each Action in Part II of this Guide, but the final published Call for proposals should be consulted;
3. Comply with the rules on the minimum and maximum duration of projects and the minimum/maximum number of partners and countries involved, as indicated in Part II of this Guide.
4. Involve, if an application is submitted by a consortium, at least one organisation established in an EU Member State. For multilateral projects, European associations with members established in several LLP participating countries who are actively participating in the project, shall be considered to fulfil the requirement regarding the minimum number of countries, without having to involve other bodies in the consortium, although this is recommended where appropriate. Unilateral projects and Jean Monnet multilateral projects do not have to comply with the condition to include at least one organisation established in an EU Member State;
5. Be drawn up in one of the official languages of the European Union<sup>6 7 8 9</sup>. Applications from consortium must be submitted in the working language of the consortium;
6. Be submitted exclusively using the correct **official application form** for the Action concerned and be electronically completed in full<sup>10</sup> (not handwritten);
7. Include a grant request expressed in Euro.

6 With the exception of mobility grant applications submitted to National Agencies in the EFTA/EEA and candidate countries. These grant applications may be drafted in the national language of the applicant.

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

8 Applicants for the Jean Monnet Programme must submit their applications in English, French or German.

9 Applicants for the Study Visits in the Transversal Programme are required to provide the application form in the language of the Study Visit.

10 Applicants in some Actions may be required to complete an on-line application form.

If an application is deemed ineligible, a letter indicating the reasons will be sent to the applicant.

#### **ELIGIBLE COUNTRIES**

Applicants must be located in a country participating in the LLP<sup>11</sup>.

#### **ELIGIBILITY CRITERIA FOR MOBILITY**

Recipients of mobility grants for individuals must be either:

- nationals of a country participating in the Lifelong Learning Programme;
- nationals of other countries, provided that they are either permanent residents according to national legislation, or registered as stateless persons or hold refugee status in a country participating in the programme.

In the case of individual transnational mobility activity, either the country of origin or the country of destination must be a Member State of the EU, except where the grant is awarded for the purposes of enabling the grant-holder to participate in a learning event involving participants from several countries. This exception therefore refers to mobility carried out within multilateral partnerships and projects, as well as to Actions such as In-service training under Comenius and Grundtvig, Intensive Programmes under Erasmus, Grundtvig Workshops and the Study Visits under the Transversal Programme. Please consult the descriptions of the specific Actions in Part II of this Guide to find out whether this rule applies to the particular Action in which you are interested.

In some exceptional cases, mobility within a single country may also be supported, notably in the case of Preparatory visit grants awarded for participation in a transnational contact seminar organised by the National Agency of the country concerned.

#### **ELIGIBILITY CRITERIA FOR APPLICANT ORGANISATIONS**

Where applications are to be submitted by institutions and organisations and not by individuals, the institutions / organisations concerned must have the status of legal body. Please consult Part II of this Guide for any additional eligibility rules relating to a specific programme and/or Action.

### **b. Exclusion criteria for applicants**

Applicants will be excluded from participating in the programme if they are in any of the following situations defined in Article 114 of the Financial Regulation applicable to the general budget of the European Communities:

1. they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;

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11 Except for the Jean Monnet programme which is open to higher education institutions worldwide.



2. they have been convicted of an offence concerning their professional conduct by a judgment which has the force of *res judicata*;
3. they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
4. they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
5. they have been the subject of a judgment which has the force of *res judicata* for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
6. following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations;

Applicants shall not be awarded a grant if, during the grant award procedure, they:

1. are subject to a conflict of interest with the organisation or persons who are directly or indirectly involved in the grant award procedure;
2. are guilty of misrepresentation or have failed to provide the information required.

Administrative and financial penalties may be imposed on grant holders who are guilty of misrepresentation or are found to have seriously failed to meet their contractual obligations under a contract or previously awarded grant, in accordance with Articles 93 to 96 of the Financial Regulation.

### c. Selection criteria

Selection criteria are those used to assess whether the applicant organisation / partnership has the operational and financial capacity necessary to undertake the proposed activity. The selection criteria below do not apply to individuals applying for a grant.

Applicant organisations may be required to provide documents to attest to their operational and financial capacity (see below). If, on this basis, the Agency considers that operational and/or financial capacity has not been proved or is not satisfactory, it may reject the grant application or ask for further information.

#### **Organisations considered having sufficient financial, professional and administrative capacity and financial stability**

Organisations established as "public bodies" under relevant national legislation are exempt from the provisions presented under Operational Capacity and Financial Capacity below. Additionally, Article 7 of the Annex to the LLP Decision allows for certain education and training organisations established under non-public legislation (for example certain private bodies and non-governmental organisations – NGOs) to benefit from the same exemption. As a result, institutions or organisations in the education and training sector which have received over 50% of their annual revenues from public sources over the last two years (excluding Community grant funds<sup>12</sup>), or which are controlled by public bodies or their representatives, may also be considered to have sufficient financial and

<sup>12</sup> Operating grant can be considered, if it is being received on a regular basis, to comply with a capacity and stability.





administrative capacity and stability. These applicants are nevertheless required to sign a declaration of honour, normally contained in the application form, stating that they comply with the conditions mentioned above. The European Commission and the Agencies reserve the right to request additional documentation to prove the veracity of this declaration.

### **Operational capacity**

Applicants will be evaluated as regards the professional competencies and qualifications necessary for carrying out the proposed activity.

If required in the application forms, applicants must submit the CVs of key staff involved in the project, showing relevant professional experience. For consortia, this obligation applies to all partners.

These documents must be provided in one of the official languages of the European Union, and the grant award procedure may specify that they be submitted in the language used to present the application.

### **Financial capacity**

Applicants must have the stable and sufficient sources of funding necessary for maintaining their activity throughout the period during which the proposed project is to be carried out and for participating in its co-funding.

Except for the organisations described in the section on "Organisations considered having sufficient financial, professional and administrative capacity and financial stability" above, applicants must submit, if required by the application form, the following documents attesting to their financial capacity:

- for grant applications over EUR 25.000, one copy of the official annual accounts for the most recent financial year<sup>13</sup> for which accounts have been closed;
- for grant applications over EUR 500.000, an external audit report produced by an approved auditor, certifying the accounts for the last year available.

Proof of financial capacity is not normally requested for grants below EUR 25.000.

Subject to the outcome of the assessment of the application and the examination of the applicant's financial capacity in relation to the grant application, the applicant may be offered a Grant Agreement/decision with an obligation to provide a guarantee for pre-financing, a Grant Agreement without pre-financing or a Grant Agreement with pre-financing payments in several instalments.

## **d. Award criteria**

Award criteria are used to assess the quality of grant applications.

Eligible applications will be assessed on the basis of the published award criteria for each Action, taking into account the priorities set out in the relevant Call for proposals. The description of each Action in Part II of this Guide contains the award criteria which will be used in the assessment. The scoring mechanism and weighting of the award criteria will be published on the websites of the National Agencies or the Executive Agency respectively. In the case of decentralised actions, the weighting is nevertheless common for all National Agencies. Any additional national award criteria may differ in content from

<sup>13</sup> "Official" means accounts certified by an appropriate external body and/or published and/or approved by the organisation's general assembly.



country to country, but their total weight will be the same for all countries. Any such additional national award criteria will be published on the relevant National Agency website.

The Decision establishing the Lifelong Learning Programme (LLP) encourages the participation in decentralised actions of individuals or organisations not having previously participated in the Lifelong Learning Programme or its predecessors (Article 1.3.f). Participation of people with special needs and disadvantaged groups is similarly encouraged.

Grants are awarded on the basis of the budget available and the relative quality of grant applications, taking into account the maximum contribution of the European Union (EU) and, where relevant, the maximum co-financing percentage to be provided by the EU.

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

The grant award results will be published on the website of the Agency concerned as soon as possible after decisions have been made, and in all instances at the latest 6 months after the grant award decision. This publication will include the name of the beneficiary, the title of the supported project and the maximum grant amount awarded (and co-funding percentage if applicable). Personal data of individual persons selected for an individual mobility grant will not, however, be published.



## 4. FINANCIAL PROVISIONS

### 4.A. GENERAL FINANCIAL CONDITIONS APPLICABLE TO ALL ACTIONS

The decision to award a grant in respect of an action is formalised either through a Grant Agreement to be signed by the two parties (the Agency and the grant beneficiary) or through a unilateral Decision of the Agency, notified to the grant beneficiary.

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

Each project may give rise to the award of only one grant from the Community budget. The grant may not have the purpose or effect of producing a profit for the beneficiary. Grants may not be awarded retrospectively for activities already completed at the time of the submission of the grant application.

A grant may under no circumstances exceed the amount initially requested and may be below the amount requested by the applicant.

A grant is an incentive to carry out a project or activity which would not be feasible without the financial support of the European Union and is based on the principle of co-financing.

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

Grant Agreements or Decisions may be amended only by additional written Agreements or Decisions. Such additional Agreements or Decisions shall not have the purpose or the effect of making changes that would call into question the decision to award the grant or be contrary to the equal treatment of applicants. An additional Agreement or Decision cannot be issued after the end of the eligibility period of costs and activities specified in the initial Grant Agreement or Decision.

### 4.B. TYPES OF FINANCING

Please note that in the context of financial support provided by the European Union (EU), and throughout this document, the term "project" is understood to mean any of the Activity Types as described in section 1.B.

EU support may take the form of a lump sum<sup>14</sup>, a flat-rate<sup>15</sup> grant based on a scale of unit costs, or the reimbursement of a percentage of eligible costs. Depending on the grant type, a combination of all or some of these types of grant support is possible. The budget for a project has to be drawn up accordingly.

- In the case of grants awarded as a lump sum, the beneficiary has to be able to prove that the activity for which grant support is awarded has really taken place, rather than the actual amount of expenditure. If the supported activity is realised in a satisfactory manner, the full grant amount is acquired. In the case of underperformance, reimbursement of (part of) the grant awarded will be normally required on the basis of the criteria laid down for each decentralised action.
- In the case of flat-rate grants using scales of unit costs (for example maximum daily rates for subsistence), the beneficiary does not have to justify the costs incurred but has to be able to prove the reality of activities resulting into the entitlement to a specific grant amount (for example the number of days spent abroad determine the maximum amount to which one is entitled for the stay).
- In the case of (the part of) a grant awarded on the basis of real costs, the beneficiary shall keep and be able to produce upon request all proofs of expenditure related to the expense items based on real costs.
- Eligible costs: the type of expenditure that is considered to be eligible within a budget for a project that is co-financed with European Union funding. The rules presented in this Guide are used as the basis to review the estimated expenditure presented in an application. In the event that expenditure fails to comply with these rules, all or part will be deemed "ineligible" (i.e. not the subject of European Union co-financing). At the end of the analysis the approved project budget will include only the eligible items.
- Reimbursement of a percentage of eligible costs: the applicant will define his expenditure in terms of real costs (where maximum eligible rates may apply). European Union financing will be calculated by applying a percentage to real eligible expenditure. The contribution will be reduced pro rata if, at final reporting stage, the project is not fulfilled or is only partially fulfilled or funds have been spent on ineligible expense items. Where the reported costs are less than foreseen, the contribution will be reduced by applying the percentage fixed in the Grant Agreement. Details will be included in the documentation provided for managing Grant Agreements.

#### **4.C. MOBILITY GRANTS AWARDED FOR INDIVIDUALS**

Mobility grants are based on various components of costs. The rates proposed below represent maximum amounts.

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<sup>14</sup> "Lump sums shall cover in global terms certain costs necessary for carrying out an action, or for the annual operation of a beneficiary, in accordance with the terms of the agreement and on the basis of an estimate." (Financial Regulation, Article 108a(a), point (b) and Implementing Rules to the Financial Regulation, Article 180a, point 2.

<sup>15</sup> Flat-rate financing shall cover specific categories of expenditure which are clearly identified in advance either by applying a percentage fixed in advance or by the application of a standard scale-of-unit cost." (Financial Regulation, Article 108a(1), point (c) and Implementing Rules to the Financial Regulation, Article 180a, point 3.

The budget for mobility activities is based on (a combination of) subsistence costs, travel costs and other costs. Where costs are based on scales of unit costs or on real costs, the general criteria for eligibility (see below) apply.

For short duration mobility (except Grundtvig Workshops) travel cost is based on real cost. In the case of mobility with a duration of 13 weeks or more, as well as in the case of Grundtvig Workshops, travel costs are deemed to be covered within the subsistence lump sum and no additional grant for travel is awarded.

## A. Subsistence Costs

For all mobility actions, the contribution to subsistence costs will be a flat-rate grant calculated on the basis of daily, weekly<sup>16</sup> or monthly rates. Subsistence costs cover accommodation, meals, local travel, the cost of telecommunications, including fax and Internet, insurance and all other sundries.

For mobility actions with a duration of up to and including 12 weeks (except Grundtvig Workshops), the awarded grants do not cover travel costs; these costs will be reimbursed on the basis of real costs. For mobility actions of a minimum duration of 13 full weeks, the awarded grants will be considered a global flat-rate contribution to cover all costs, including travel costs.

Support to subsistence costs is calculated on the basis of scales of unit costs of the host country.

**Persons with special needs** may benefit from specific financing measures: the grant towards both subsistence and travel costs will be assessed case-by-case and based on real costs incurred. In such case, the grant may provide for the subsistence and travel costs of an accompanying person if justified. In some Actions, the grant level awardable under these circumstances is subject to a maximum.

**NOTE:** Applicants should note that the amounts indicated in the following tables refer to the absolute maxima allowable across all countries participating in the programme. The actual amounts awarded by specific National Agencies vary from country to country and from one action to another, and may in some cases be significantly lower than the maximum amounts indicated in them. In determining the actual amounts to be awarded, National Agencies take into account in particular the total budget available to them, the volume of demand in their respective country and the need for equitable treatment of all beneficiaries in their country. Applicants are therefore strongly advised to consult the website of the relevant National Agency in their country, in order to ascertain the actual amounts which they would be likely to receive if their application is successful.

### *Comenius*

Applicants for Comenius initial teacher training mobility within Comenius multilateral projects must consult the Subsistence Costs table on the website of the EACEA in order to ascertain the maximum eligible amounts per week.

<sup>16</sup> In this context, a week is equivalent to a mobility period of seven full consecutive working days, including travel.



**Table 1a: Lifelong Learning Programme - Mobility - Subsistence - Maximum rates (in EUR) per host country and duration of stay. (For Erasmus mobility exceeding 12 weeks see Table 1b)**

	Excluding travel and visa costs								Including travel and visa costs		
	Total amounts first week						Total amount		Additional amount per week (wks 3 - 12)*	Total amount for 13 full weeks **	Additional amount per week (wks 14 - 45)*
	1 day	2 days	3 days	4 days	5 days	6 days	One week (7 days)	Two weeks			
BE	210	420	630	840	1.050	1.260	1.470	2.007	196	<b>4.504</b>	196
BG	130	260	390	520	650	780	910	1.243	122	<b>2.796</b>	122
CZ	180	360	540	720	900	1.080	1.260	1.720	168	<b>3.860</b>	168
DK	290	580	870	1.160	1.450	1.740	2.030	2.772	271	<b>6.224</b>	271
DE	210	420	630	840	1.050	1.260	1.470	2.007	196	<b>4.504</b>	196
EE	170	340	510	680	850	1.020	1.190	1.625	159	<b>3.650</b>	159
EL	200	400	600	800	1.000	1.200	1.400	1.912	187	<b>4.294</b>	187
ES	210	420	630	840	1.050	1.260	1.470	2.007	196	<b>4.504</b>	196
FR	250	500	750	1.000	1.250	1.500	1.750	2.389	234	<b>5.368</b>	234
IE	260	520	780	1.040	1.300	1.560	1.820	2.485	243	<b>5.580</b>	243
IT	240	480	720	960	1.200	1.440	1.680	2.294	224	<b>5.148</b>	224
CY	190	380	570	760	950	1.140	1.330	1.816	178	<b>4.082</b>	178
LV	160	320	480	640	800	960	1.120	1.529	150	<b>3.438</b>	150
LT	160	320	480	640	800	960	1.120	1.529	150	<b>3.438</b>	150
LU	210	420	630	840	1.050	1.260	1.470	2.007	196	<b>4.504</b>	196
HU	160	320	480	640	800	960	1.120	1.529	150	<b>3.438</b>	150
MT	190	380	570	760	950	1.140	1.330	1.816	178	<b>4.082</b>	178
NL	230	460	690	920	1.150	1.380	1.610	2.198	215	<b>4.936</b>	215
AT	220	440	660	880	1.100	1.320	1.540	2.103	206	<b>4.726</b>	206
PL	160	320	480	640	800	960	1.120	1.529	150	<b>3.438</b>	150
PT	190	380	570	760	950	1.140	1.330	1.816	178	<b>4.082</b>	178
RO	140	280	420	560	700	840	980	1.338	131	<b>3.006</b>	131
SI	180	360	540	720	900	1.080	1.260	1.720	168	<b>3.860</b>	168
SK	180	360	540	720	900	1.080	1.260	1.720	168	<b>3.860</b>	168
FI	240	480	720	960	1.200	1.440	1.680	2.294	224	<b>5.148</b>	224
SE	240	480	720	960	1.200	1.440	1.680	2.294	224	<b>5.148</b>	224
UK	290	580	870	1.160	1.450	1.740	2.030	2.772	271	<b>6.224</b>	271
IS	240	480	720	960	1.200	1.440	1.680	2.294	224	<b>5.148</b>	224
LI	250	500	750	1.000	1.250	1.500	1.750	2.389	234	<b>5.368</b>	234
NO	290	580	870	1.160	1.450	1.740	2.030	2.772	271	<b>6.224</b>	271
TR	160	320	480	640	800	960	1.120	1.529	150	<b>3.438</b>	150

\* For weeks 3-12 and 14-45, additional full weeks are counted on the basis of the amount indicated in the columns 'Additional amount for weeks 3-12 and 14-45'.

\*\* This includes a special amount covering travel and visa costs as they are included from week 13 onwards.

The calculation method for an "incomplete" week is the number of additional days multiplied with 1/7 of the amount indicated in the columns 'Additional amount per week' for weeks 3-12 and 14-45. An exception is made for the second incomplete week for which the basis for calculation is the number of additional days multiplied by 1/7 of the difference between the amounts for one week and two weeks.

**Table 1b: Lifelong Learning Programme 2009 - Erasmus - Mobility Subsistence - Maximum rates (in EUR) per host country including travel**

HOST COUNTRY	Monthly rate 3 to 12 months
Belgique/Belgie – BE	780
Bulgarija – BG	500
Česká republika – CZ	665
Danemark – DK	1.075
Deutschland – DE	780
Eesti – EE	620
Ellas – EL	728
España – ES	799
France – FR	922
Eire/Ireland – IE	952
Italia – IT	877
Kypros – CY	713
Latvija – LV	597
Lietuva – LT	590
Luxembourg – LU	780
Magyarország – HU	594
Malta – MT	706
Nederland – NL	859
Österreich – AT	833
Polska – PL	597
Portugal – PT	717
Romania – RO	504
Slovenija – SI	676
Slovensko – SK	687
Suomi – FI	911
Sverige – SE	896
United Kingdom – UK	1.086
Island – IS	896
Liechtenstein – LI	937
Norge – NO	1.086
Türkiye – TR	582

## B. Travel Costs

For mobility actions with a duration of up to and including 12 weeks (except Grundtvig Workshops), the NA will reimburse travel costs, on the basis of real costs incurred including any costs for entry/exit visas as required, either in total or in part only (by applying a ceiling or a maximum covering percentage). Any other costs related to the travel are ineligible.

If individuals reside in one of the overseas countries and territories listed in the Decision 2001/822/EC of the Council (see [Countries](#)) or have one of these territories as destination, real incurred travel costs shall – except in the case of Grundtvig Workshops – be reimbursed in total, independent of the duration of the mobility activity.

When travel costs are allocated on the basis of real costs, the same rules apply as for travel costs for multilateral projects, networks, accompanying measures, studies and comparative research, except that travel insurance and any cancellation costs are deemed to be included in subsistence costs.

## **C. Other costs**

### **COMENIUS AND GRUNDTVIG**

A contribution on the basis of real costs will be made, up to a maximum of 150 Euros per day, for course or seminar fees for Comenius In-service training for school education staff and for course or seminar fees for Grundtvig In-service training for adult education staff.

### **COMENIUS, GRUNDTVIG, LEONARDO DA VINCI**

A contribution to pedagogic, linguistic and cultural preparation can be granted up to a lump sum of maximum 500 € per participant, with the exception of the Senior Volunteering Projects under Grundtvig (for which the "Other costs" relating to individual participants are covered in section 4.D below).

## **4.D. GRANTS FOR ORGANISATIONS IMPLEMENTING MOBILITY (ERASMUS, LEONARDO DA VINCI AND GRUNDTVIG)**

In the case of Erasmus, Leonardo da Vinci and some Grundtvig mobility actions, the mobility activities are organised by institutions, such as for example Higher Education institutions, VET / adult education organisations. These Mobility actions require the clear commitment from the sending or hosting organisation to ensure quality in all dimensions (pedagogic as well as logistic) of the mobility period. These organisations are responsible for managing the mobility grants to the individuals. The levels and rules for the grants for participants are described above. Additionally, the organisations receive a contribution to the costs for organising the mobility activities. This support is given for the organisation, not the individual.<sup>17</sup>

### **ERASMUS AND LEONARDO DA VINCI**

#### Grant to sending institutions/consortia for the Organisation of Mobility

A maximum scale of unit costs applies to calculate the grant to sending institutions/consortia for the Organisation of Mobility. Scales are defined per group of outgoing persons and, in the case of Erasmus, for incoming invited teaching staff from enterprises. For the first 25 persons out of the total concerned mobilities scale 1 applies, then the next scale for the 26th to 100th person etc.

<sup>17</sup> All amounts are in EUR per person/beneficiary unless otherwise indicated.





**Table 2: Erasmus and Leonardo da Vinci - Maximum scale of unit costs to apply to calculate grants to higher education institutions and placement consortia to ensure quality of the mobility arrangements for students and staff, including Erasmus student placements**

Scale 1 (1st to 25th person)	390 €/beneficiary
Scale 2 (26th to 100th person)	315 €/beneficiary
Scale 3 (101th to 400th person)	225 €/beneficiary
Scale 4 (> 400th person)	180 €/beneficiary

**ERASMUS AND GRUNDTVIG**

Grants to institutions for organising Erasmus Intensive Language Courses (EILC), Erasmus Intensive Programmes (IP) and Grundtvig Workshops

The grant is awarded as a lump sum amount. The basis maximum amount is established for EILC at EUR 6.160 and for IP and Grundtvig workshops at EUR 7.180 for Belgium which is determined in such a way that the beneficiary organisation is supposed to bring in own sources of financing. The maximum amount for the other countries is obtained by applying the Eurostat Cost of Living Index [AS: for the latest year available] (see **Table 3a** below).





**Table 3a: Erasmus and Grundtvig - Maximum lump sum amounts (in EUR) for organising Erasmus Intensive Language Courses (EILC) and Intensive Programmes (IP) and Grundtvig Workshops**

Country			Erasmus EILC	Erasmus IP and Grundtvig Workshops
Belgique/Belgie	BE	Belgium	6.160	7.180
Balgarija	BG	Bulgaria	3.950	4.600
Česká republika	CZ	Czech Republic	5.250	6.130
Danemark	DK	Denmark	8.500	9.900
Deutschland	DE	Germany	6.170	7.190
Eesti	EE	Estonia	4.900	5.710
Ellas	EL	Greece	5.750	6.700
España	ES	Spain	6.300	7.340
France	FR	France	7.280	8.490
Eire	IE	Ireland	7.520	8.760
Italia	IT	Italy	6.930	8.080
Kypros	CY	Cyprus	5.620	6.560
Latvija	LV	Latvia	4.730	5.510
Lietuva	LT	Lithuania	4.650	5.420
Luxembourg	LU	Luxembourg	6.160	7.180
Magyarország	HU	Hungary	4.690	5.470
Malta	MT	Malta	5.580	6.510
Nederland	NL	Netherlands	6.790	7.910
Österreich	AT	Austria	6.560	7.650
Polska	PL	Poland	4.720	5.500
Portugal	PT	Portugal	5.660	6.600
Romania	RO	Romania	3.990	4.650
Slovenia	SI	Slovenia	5.350	6.230
Slovensko	SK	Slovakia	5.430	6.330
Suomi/Finland	FI	Finland	7.180	8.370
Sverige	SE	Sweden	7.080	8.250
United Kingdom	GB	United Kingdom	8.590	10.010
Island	IS	Iceland	7.060	8.230
Liechtenstein	LI	Liechtenstein	7.410	8.640
Norge	NO	Norway	8.580	10.000
Türkiye	TR	Turkey	4.600	5.360

#### GRUNDTVIG – SENIOR VOLUNTEERING PROJECTS

Organisations sending and hosting volunteers receive a single grant, consisting of the following components:

##### 1. sending costs:

- a) a flat-rate grant, based on the number of outgoing volunteers, to cover organisational costs, as well as the cultural, linguistic and personal preparation of the volunteers they send out and costs related to the follow-up of their experience upon return (see **Table 3b** below)
- b) a variable grant for the travel costs of the volunteers they send out, based on and to be accounted for as real costs (see Section 4C above);

2. hosting costs:

- a) a flat-rate grant, based on the number of incoming volunteers, to cover organisational costs as host organisation (see **Table 3b** below)
- b) a flat-rate grant per volunteer based on scales of unit costs, to cover board and lodging, insurance, local travel and support to the incoming volunteers during their volunteering period (see **Table 1a** above).

**Table 3b: Grundtvig Senior Volunteering Projects – Maximum scale of unit costs for organising mobility of senior volunteers**

	<b>Per volunteer</b>
Sending organisation	800 €
Hosting organisation	390 €

#### 4.E. PARTNERSHIPS

Partnerships are (often small-scale) projects for practical cooperation between organisations from at least 3 countries, with the exception of Bilateral Partnerships under Comenius which involve only two countries. One institution / organisation per Partnership is the “coordinator”; the others are “partners”. The Partnership application is jointly prepared by all the institutions participating, but each institution receives its grant from its own National Agency. Partnership grants are awarded for a 2-year duration.

The activities of Partnerships consist of **local activities** in a partner's own organisation (learning activities, fieldwork, research, etc) and **mobility activities** to visit partner institutions abroad (project meetings, study visits, staff exchanges, class exchanges etc.).

The rules for Partnership projects are broadly the same, no matter under which programme they are implemented (Comenius, Grundtvig, Leonardo da Vinci), though the grants awarded may vary to some extent from one country or programme to another.

#### Lump sums

Each participating institution receives a project grant in the form of a lump sum as a contribution towards all its project costs: travel and subsistence during mobility periods and costs linked to local project activities. Grants are defined on the basis of a minimum number of “mobilities” that the participating institution intends to carry out during the agreement period. One “mobility” corresponds to one trip abroad carried out by one person in the framework of the Partnership. The Grant Agreement defines the types of eligible mobility activities. At Final Report stage, beneficiaries are not requested to submit proofs of expenditure, but they will need to provide evidence that the activities foreseen in their application have been carried out in a full and satisfactory manner.

**Nota bene:**

To take account of the needs of staff or pupils/learners with special needs, or if mobility is planned to or from partners located in one of the territories listed as "Overseas Countries and Territories" (see the section 1.C. "Which countries participate in the programme?"), the minimum number of mobilities may be reduced by up to 50%. For example, an institution which anticipates major additional costs linked to mobility activities with participants with special needs can ask its National Agency for a reduction of the minimum number of mobilities linked to grant amount requested. If the National Agency accepts the request, the grant amount stays the same but the minimum required number of mobilities will be lower.

**Table 4: Comenius, Leonardo da Vinci and Grundtvig – maximum lump sum amounts for Partnerships**

The table below shows the maximum grant amounts for each Partnership type, based on the number of planned mobilities. The actual amounts awarded by National Agencies vary from country to country and may in some cases be significantly lower than the maximum amounts indicated below. Applicants are strongly advised to consult the website of the relevant National Agency in their country, in order to ascertain the actual amounts which they would be likely to receive if their application is successful.

Partnership type		Minimum number of mobilities per partner in a 2-year Partnership	Maximum lump sum grant per partner	Maximum lump sum grant per partner	Maximum lump sum grant per partner
			COMENIUS	LEONARDO DA VINCI	GRUNDTVIG
<b>Multilateral Partnerships</b>	<b>Small</b> number of mobilities	4	10.000 €	10.000 €	15.000 €
	<b>Limited</b> number of mobilities	8	15.000 €	15.000 €	17.500 €
	<b>Average</b> number of mobilities	12	20.000 €	20.000 €	20.000 €
	<b>High</b> number of mobilities	24	25.000 €	25.000 €	25.000 €
<b>Bilateral Partnerships</b>	Bilateral <b>Comenius</b> Partnerships - Small group class exchange of 10 to 19 pupils.	12	20.000 €	-	-
	Bilateral <b>Comenius</b> Partnerships - Large group class exchange of 20 pupils or more	24	25.000 €	-	-

**Exception: Comenius Regio Grants:** Comenius Regio grants consist of a lump sum funding for mobilities plus a grant based on real costs for additional expenses. The contribution to the additional costs are not included in the mobility lump sum in order to allow Comenius Regio Partnerships to conduct different activities including the organisation of larger scale conferences or the implementation of research activities and studies. The grant amount for additional project costs is limited to a maximum of 25.000 EUR.



The table below sets out the maximum lump sum amounts. The authorities of participating countries will determine the actual amount applicable in each country.

Comenius Regio Partnerships	Partnership categories		long distances (> 300 km)	Short distances (< 300 km)
	Small number of mobilities	4	4.000 €	2.000 €
	Limited number of mobilities	8	8.000 €	4.000 €
	Average number of mobilities	12	10.000 €	5.000 €
	High number of mobilities	24	20.000 €	10.000 €

Applicants are asked to present a budget for any additional costs, except costs related to mobility (which are already covered by the lump sum amount). For this budget the rules outlined under the chapter 4.F apply (eligibility of costs, equipment costs, subcontracting and other costs); National Agencies will verify the eligibility of the budget. Staff costs are **not** an eligible cost item under Comenius Regio.

#### 4.F. MULTILATERAL PROJECTS, NETWORKS, ACCOMPANYING MEASURES, OBSERVATION AND ANALYSIS

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

The estimated budget for the application must have revenue and expenditure in balance and show clearly the costs which are eligible for financing from the EC budget.

The allocated grant will not cover more than 75% of the eligible costs.

Applicants shall base the project budget:

1. on real daily staff cost rates. Under no circumstances may these exceed the maximum rates indicated in **Table 5** below. Any excess amount will be considered as ineligible. The veracity of these costs may be the subject of an audit;
2. on real daily subsistence rates. Under no circumstances may these exceed the maximum rates published on the website of the Executive Agency. Any surplus will be considered as ineligible;
3. on real costs with regard to other categories of cost, as indicated in the application form.

#### Eligible Costs

The general context, nature and amount of expenditure will be considered when assessing eligibility.

The following criteria apply to the cost category for which the cost is estimated and either the associated **number of units** (which will lead to the estimated cost applying the appropriate formula) or the estimated **cost as such**.

To be considered as eligible, costs must satisfy the following general criteria:

- They must relate to activities involving **countries** that are eligible to participate in the programme. Any costs relating to activities undertaken outside these countries or by organisations that are not registered in an eligible country are not eligible unless they are necessary for the completion of the project and duly explained and justified in the application form and /or in the report;
- They must be incurred by the **legal bodies/institutions of the official consortium**<sup>18</sup>;
- They must be **connected** with the project (i.e. relevant and be directly linked to the execution of the project in accordance with the work plan);
- They must be **necessary** for performance of the project;
- They must be **reasonable and justified** and they must accord with the principles of **sound financial management**<sup>19</sup>, in particular in terms of value for money and cost-effectiveness;
- They must be **generated** during the lifetime of the project<sup>20</sup>;
- They must be **actually incurred** by the beneficiary and members of the consortium and be recorded in their accounts in accordance with the applicable accounting principles, and be declared in accordance with the requirements of the applicable tax and social legislation;
- They must be **identifiable and verifiable**.

The applicant's internal accounting and auditing procedures must permit direct reconciliation of the costs and revenue declared at the end of the project with the corresponding accounting statements and supporting documents. For scales of unit costs, this implies that the "number of units" must be recorded in appropriate documents (i.e. time sheets, presence lists, etc.).

Where national taxation and accounting rules do not require an invoice, an accounting document of equivalent value means any document produced in order to prove that the accounting entry is accurate and which complies with the applicable accounting law.

#### **VALUE ADDED TAX**

VAT is eligible **only if** the applicant can show that he is unable to recover it.

#### **NON-ELIGIBLE COSTS**

Under no circumstance can the following types of costs be considered as eligible:

<sup>18</sup> The Decision establishing the Lifelong Learning programme defines for projects with a "project coordinator" and "project partners" the term "multilateral grouping", which is the equivalent for "consortium".

<sup>19</sup> Costs shall be defined in accordance with the principle of sound financial management, namely in accordance with the principles of economy, efficiency and effectiveness. The principle of economy requires that costs shall be defined in due time, in appropriate quantity and quality and at the best price. The principle of efficiency is concerned with the best relationship between resources employed and results achieved. The principle of effectiveness is concerned with attaining the specific objectives set and achieving the intended results.

<sup>20</sup> I.e. generated by an activity that takes place during the lifetime (duration) of the project / action. Activities taking place before or after the period specified in a Grant Agreement are not eligible for funding.



- return on capital;
- debt and debt service charges;
- provisions for losses or potential future liabilities (provisions for contractual and moral obligations, fines, financial penalties and legal costs);
- interest owed;
- doubtful debts;
- exchange losses;
- VAT, **unless** the applicant can show that he is unable to recover it;
- costs declared by the applicant and covered by another action or work programme receiving a European Union grant or any other source of funding;
- excessive or reckless expenditure;
- purchase of capital assets;
- in the case of rental or leasing of equipment, the cost of any buy-out option at the end of the lease or rental period;
- costs associated with the preparation of the application for the Lifelong Learning Programme;
- costs of opening and operating bank accounts (costs of transferring funds are eligible);
- costs incurred in relation to any document required to be submitted with the application (audit reports, etc.).

#### **ELIGIBLE DIRECT COSTS**

The eligible direct costs for the action are those costs which, with due regard for the conditions of eligibility set out above, are identifiable as specific costs directly linked to performance of the action and which can therefore be booked to it directly. This document contains the definitions of a number of cost categories which are eligible, provided that they satisfy the general eligibility criteria set out above.

#### **ELIGIBLE INDIRECT COSTS**

The eligible indirect costs are those costs which, with due regard for the conditions of eligibility described above, are neither identifiable as specific costs directly linked to the project nor can be booked to it directly, but which have nevertheless been incurred in the management of the project. They may not include any eligible direct costs.

The indirect costs of the project eligible for EC funding are a flat-rate amount set at a maximum of 7% of the total amount of eligible direct costs. The corresponding costs need not be justified by accounting documents.

Indirect costs shall not be eligible under a project grant awarded to a beneficiary organisation which is already receiving an operating grant from the Commission during the period in question.

Examples of indirect costs are:

- All costs for equipment related to the administration of the project (i.e. PC's, portables, etc.)
- Communication costs (postage, fax, telephone, mailing, etc.)

- Infrastructure costs (rent, electricity, etc.) of the premises where the project is being carried out
- Office supplies
- Photocopies

## Staff Costs

The following applies to all partners of a consortium, e.g. the rules on staff costs apply to all partners (including the applicant) of the consortium.

- 1) Costs relating to the following categories of staff are considered:
  - Statutory staff, having either a permanent or a temporary individual contract with a partner of the consortium. To be considered in this category, staff must report to the relevant partner organisation as an employee.
  - Temporary staff recruited through a specialised external agency by any of the consortium partners;

Costs related to staff working through subcontracting shall be included under the category "Subcontracting costs" (see below).

Staff members of Project partners are not allowed to operate in a subcontracting capacity for the project.

- 2) Applicants should base the project budget on real daily staff cost rates, which cannot exceed the maximum rate indicated in **Table 5** below. Any surplus will be considered as ineligible. The veracity of these costs may be the subject of an audit.
- 3) The rate of the country in which the partner organisation is registered will be applied, independent of where the tasks will be executed (i.e. a staff member of an organisation of Country A working fully or partly in Country B will be budgeted on the basis of the rates of Country A).
- 4) Real daily staff cost rates are based on average rates corresponding to the applicant's usual policy on remuneration, comprising actual salaries plus social security charges and other statutory costs included in the remuneration. Non-statutory costs such as bonuses, leased car, expense account schemes, incentive payments or profit-sharing schemes are excluded.
- 5) The applicant will define the category of staff and the number of days to be worked on the project, which must be commensurate with the nature of the project and the work plan.
- 6) The estimated staff costs results from multiplying the number of days with the real daily staff cost rate.

Staff costs may be included for all programmes and for all types of projects and networks. The cost of staff assigned to the action, either by the beneficiary or by the consortium partners, comprises actual salaries plus social security charges and other statutory costs included in the remuneration.

**Eligible staff costs** are calculated on the basis of scales of **eligible unit costs**. **Table 5** below stipulates **the maximum eligible daily rates for each eligible country**. The





resulting amounts must be included in the budget and will be taken into account when calculating the European Community contribution.

**Table 5: Maximum eligible daily rates (in EUR) for Staff costs – Multilateral Projects, Networks, Accompanying measures, Studies and Comparative Research**

Country			Manager	Researcher Teacher Trainer	Technical	Administrative
Belgique/Belgie	BE	Belgium	376	321	260	203
Balgarija	BG	Bulgaria	79	71	55	37
Česká republika	CZ	Czech Republic	144	144	104	75
Danemark	DK	Denmark	489	419	341	267
Deutschland	DE	Germany	363	315	253	195
Eesti	EE	Estonia	117	107	75	53
Ellas	EL	Greece	267	228	187	145
España	ES	Spain	295	265	204	143
France	FR	France	424	359	235	179
Eire	IE	Ireland	479	417	348	255
Italia	IT	Italy	568	332	225	187
Kypros	CY	Cyprus	304	267	165	113
Latvija	LV	Latvia	131	107	85	57
Lietuva	LT	Lithuania	103	88	67	47
Luxembourg	LU	Luxembourg	493	423	343	267
Magyarország	HU	Hungary	141	123	93	53
Malta	MT	Malta	129	117	91	65
Nederland	NL	Netherlands	381	333	264	207
Österreich	AT	Austria	419	323	240	199
Polska	PL	Poland	161	133	103	75
Portugal	PT	Portugal	183	161	119	79
Romania	RO	Romania	155	119	93	59
Slovenia	SI	Slovenia	252	227	183	115
Slovenská republika	SK	Slovakia	133	119	95	77
Suomi/Finland	FI	Finland	361	259	213	179
Sverige	SE	Sweden	505	432	355	273
United Kingdom	GB	United Kingdom	469	443	311	224
Island	IS	Iceland	435	396	341	219
Liechtenstein	LI	Liechtenstein	395	324	251	199
Norge	NO	Norway	553	480	392	296
Türkiye	TR	Turkey	193	123	81	52

## Subsistence Costs

- (1) Subsistence costs for staff undertaking travel to another participating country in the framework of Multilateral projects, Networks, Accompanying Measures and Studies and Comparative Research are eligible. The budget should be based on the maximum rate in the Subsistence Costs table published on the website of the Executive Agency. Any surplus will be considered as ineligible. The rate to be applied is the one of the country of destination, i.e. where accommodation costs are incurred.
- (2) Costs may be claimed only for journeys directly connected to specific and clearly identifiable project-related activities. For information on charging Subsistence Costs for non-staff members please refer to Section 'Other Costs' and 'Subcontracting Costs'.



- (3) Reimbursement is based on the existing internal rules of the Partner organisations, which may be on an actual cost (reimbursement of receipts) or daily allowance basis. In either case, proof of attendance and overnight accommodation will be required to substantiate declared costs at reporting stage.
- (4) Subsistence rates cover accommodation, meals and all local travel costs at the place of destination abroad (but not local travel costs incurred to travel from place of origin to place of destination). In calculating the number of days for which to apply the Daily Subsistence Rate it should be noted that a FULL day normally includes an overnight stay. In duly substantiated cases, a full day's allowance without an overnight stay may be allowed with a pro rata reduction (costs limited to 50% of the maximum) for accommodation.
- (5) A pro rata reduction must be applied if accommodation, meals and local travel costs are provided for by a third party.

Eligible subsistence costs are calculated on the basis of scales of eligible unit costs. The Subsistence Table published on the website of the Executive Agency comprises the maximum eligible daily rates. The resulting amounts will be included in the budget and will be taken into account when calculating the European Union contribution.

In the case of Transfer of Innovation project, the information will be available on the National Agencies websites.

## Travel Costs

Travel costs are allocated on the basis of real costs.

- (1) Travel costs for staff taking part in the project are allowable, provided that they are in line with each partner's usual practices on travel costs.
- (2) Costs may be claimed only for journeys directly connected to **specific** and clearly **identifiable** project-related activities. For information on charging Travel Costs for non staff members please refer to Section "Other Costs" and "Subcontracting Costs".
- (3) Reimbursement is based on real costs, independent of the means of travel chosen (rail, bus, taxi, plane, hire car). Partners are required to use the cheapest means of travel (e.g. use Apex tickets for air travel and take advantage of reduced fares, where this is not the case then a full explanation should be provided).
- (4) The travel cost for a journey should include all costs and all means for travel from the point of origin to the point of destination (and vice versa) and may include visa fees, travel insurance and cancellation costs.
- (5) Expenses for private car travel (personal or company cars), where substantiated and where the price is not excessive, will be refunded as follows (whichever is the cheapest):
  - Either a rate per km in accordance with the internal rules of the organisation concerned up to a max of €0.22;
  - Or the price of a rail, bus or plane ticket (see point (3) above). Only one ticket shall be reimbursed, independently of the number of people travelling in the same vehicle.

- (6) For hire cars (maximum category B or equivalent) or taxis: the actual cost where this is not excessive compared with other means of travel (also taking account of any influencing factors such as time, large volume of luggage due to the nature of the project). Reimbursement takes place independently of the number of people travelling in the same vehicle.

For Comenius Multilateral projects involving mobility activities during Initial Teacher Training, travel costs (based on real costs) and subsistence costs will be recorded separately under Other Costs. The rules for travel and subsistence cost apply.

### **Equipment costs**

- (1) Purchase, rent or lease of equipment (new or second-hand), including the installation, maintenance and insurance costs, is considered eligible.
  - only when specific and necessary for achieving the goals of the project/action. Proposed equipment costs must always be clearly explained and specifically justified. The rules for procurement apply (see below);
  - provided that it is depreciated in accordance with the tax and accounting rules applicable to the beneficiary / consortium partner incurring the cost, and generally accepted for items of the same kind. Only the portion of the equipment's depreciation corresponding to the duration of the action and the rate of actual use for the purposes of the action may be taken into account. The applicant must explain the rules applied. If the nature and/or the context of its use justify different treatment, this should be duly justified.
- (2) All equipment related to the administration of the project (i.e. PC's, portables, etc.) and all equipment purchased before the start of a project can be covered only by the indirect costs of the project.
- (3) The total cost for equipment may not be more than 10% of the eligible direct costs of the project.

### **Subcontracting costs**

- (1) Costs entailed by procurement contracts for the purposes of carrying out specific and limited work for the project, can be considered eligible when awarded by a partner to an external body, organisation or individual (only if not employed by any of the Partner organisations of the consortium). This includes work such as translation, interpretation and printing, etc.<sup>21 22</sup>
- (2) In order to maintain the concept of the project partnership, the management and the general administration of the project may not be subcontracted.
- (3) Costs are based on a verifiable estimate or, if the subcontractor is identified, on the basis of an offer. The estimate/offer will cover all costs (i.e. staff costs plus travel costs, etc.).
- (4) The applicant will award the contract to the tender offering best value for money, that is to say, to the tender offering the best cost-benefit ratio, in compliance with

<sup>21</sup> This refers to individuals who may be self-employed i.e. who are responsible for their own social security or social contributions, pensions and taxes. National legislation on the definition of these individuals can vary and should always be considered.

<sup>22</sup> Covers also consultants, who provide one-off services for which a fee is received.

the principles of transparency and equal treatment for potential contractors, care being taken to avoid any conflict of interests.

- (5) The following specific European Union rules with regard to procurement apply:
- Contracts with a value below €12.500 can be paid on a presentation of an invoice;
  - Contracts with a value between €12.500 and €25.000 are subject to a procedure involving at least three tenderers;
  - Contracts between €25.000 and €60.000 are subject to a procedure involving at least five tenderers;
  - For contracts of a value over €60.000, national rules with regard to procurement apply.
- (6) The total costs for subcontracting may not be more than 30 % of the total direct costs of the project

### **Other Costs**

Other costs are allocated on the basis of real costs.

- (1) Costs arising directly:
- from requirements imposed by the Grant Agreement are eligible (dissemination of information, specific evaluation of the action, audits, reproduction, translation etc.), including the costs of any financial services (notably the cost of financial guarantees);
  - from the realisation of specific activities or of products/results of the project are eligible (e.g. the organisation of seminars where the seminar is foreseen as a product/result and where task-related costs are easily identifiable), the production of proceedings of a seminar, the production of a video, the purchase of product-related consumables (reams of paper for printing of publications, blank DVD), etc.
- (2) Only activities which are specific and necessary for achieving the goals of the project are considered eligible. Proposed costs must always be duly justified.
- (3) When travel and/or subsistence costs are reimbursed to third parties (i.e. for the costs of people who are neither staff of the partners in the consortium, nor subcontractors), the rules applicable to the reimbursement of costs for staff of the partners in the consortium will be applied.
- (4) All costs incurred through subcontracting must be mentioned under the "subcontracting" category. The category "Other costs" can only contain costs incurred by the partners themselves.
- (5) In certain cases, other costs which are not covered by the other cost categories mentioned above may also be considered eligible. Some examples are: one-off costs for press releases and publicity, purchase of copyrights and other Intellectual Property Rights, purchase of information materials (books, studies and electronic data); conference fees; registration fees for conferences; rental of exhibition space, etc. Also Travel costs and subsistence costs for Comenius Multilateral projects

involving mobility activities during Initial Teacher Training are covered under this heading.

All costs related to the administration of the project (i.e. consumables, supplies, photocopying costs, telephone costs, paper, etc.) are covered by indirect costs of the project.

#### 4.G. JEAN MONNET PROGRAMME

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

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

The percentage of own resources indicated in the revenue part of the estimated budget is considered a guaranteed minimum, to be respected in the final account. The allocated grant will not cover more than 75% of the eligible costs.

Applicants shall base the project budget:

- on real daily staff cost rates. Under no circumstances may these exceed the maximum rates indicated in **Table 5** above. Any excess amount will be considered as ineligible. The veracity of these costs may be the subject of an audit;
- on real daily subsistence rates. Under no circumstances may these exceed the maximum rates indicated in **Table 1a** above. Any surplus will be considered as ineligible;
- on real costs with regard to other categories of costs, as indicated in the application form.

For Jean Monnet projects the amounts presented under staff costs and subsistence costs must be justified by the applicant. If these costs exceed the maximum rates indicated in the Jean Monnet pages of the Executive Agency, the surplus will be considered ineligible.

#### Staff costs

Staff costs may be included for all types of projects.

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

The staff costs will have to be justified by the applicant. If these costs exceed the maximum rates indicated in the Jean Monnet pages of the Executive Agency, the surplus will be considered as ineligible.

The criteria to be applied are the same as for multilateral projects, networks, accompanying measures, studies and comparative research.

### Additional criteria for Staff Costs for Jean Monnet projects

Applicants should base the project budget on real daily staff cost rates which are indicated in the Jean Monnet pages of the web site of the Executive Agency.

Staff costs may not exceed the normal costs for each staff category in the country concerned.

Staff costs must be broken down into categories 1 to 4 of the International Standard Classification of Occupations (ISCO). In any case, the following maximum amounts apply:

- Staff category 1 (maximum amount EUR 450/day)
- Staff category 2 (maximum amount EUR 300/day) – University Professors
- Staff category 3 (maximum amount EUR 250/day)
- Staff category 4 (maximum amount EUR 125/day)

### **Subsistence costs**

Subsistence costs may be included for all types of projects. These actions are managed by the Executive Agency.

The subsistence costs will have to be justified by the applicant. If these costs exceed the maximum rates indicated in the Jean Monnet pages of the web site of the Executive Agency, the surplus will be considered as ineligible. The criteria to be applied are the same as for multilateral projects, networks, accompanying measures, studies and comparative research.

### Additional criteria for Subsistence Costs for Jean Monnet Projects

The budget should be based on the maximum rate indicated on the Jean Monnet pages of the web site of the Executive Agency.

### **Travel Costs**

Travel costs are allocated on the basis of real costs. The criteria to be applied are the same as for multilateral projects, networks, accompanying measures, studies and comparative research.

### **Other Costs**

Other costs are allocated on the basis of real costs.

The criteria to be applied are the same as for multilateral projects, networks, accompanying measures, studies and comparative research.

### Teaching Costs for Jean Monnet projects

Normally this costs category only applies to Jean Monnet Chairs, *Ad personam* Jean Monnet Chair and Modules. In duly and justified cases, however, also Centres of Excellence applications could include these costs.

The number of teaching hours varies according to the type of action. For Jean Monnet Chairs the required minimum number of teaching hours is 120 per academic year. For Modules the required minimum number of teaching hours is 30 per academic year.

The hourly teaching cost is fixed at a maximum of 200 EUR.



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If the teaching costs exceed the maximum rates indicated, the surplus will be considered as ineligible. The veracity of these costs may be the subject of an audit.



## 5. DISSEMINATION AND EXPLOITATION OF RESULTS IN THE LIFELONG LEARNING PROGRAMME

The Lifelong Learning Programme 2007-13 contains explicit provision for the '[dissemination and exploitation of results](#)' of projects and other activities supported under the programme and previous related programmes, and exchanges of [good practice](#)' (Art 3.2 (d)). Support is available for these Dissemination activities as follows:

- Projects under many of the Actions within each of the four sectoral programmes and the Key Activities 2 for Languages and 3 for ICT are required to present and implement a dissemination and exploitation plan (ex-ante dissemination and exploitation of results);
- The Accompanying Measures within the four sectoral programmes and the Key Activity Languages are available for communication, dissemination and exploitation activities, as well as for Thematic Monitoring for ongoing projects working in similar areas;
- The programme also features an innovative new Key Activity 4 for the 'Dissemination and Exploitation of Results' under the Transversal Programme.

The present section of the LLP Guide provides general information on dissemination and exploitation of results; and specific guidelines for project coordinators wishing to apply for support for these purposes under the sectoral programmes and the Key Activities 2 for Languages and 3 for ICT. They should be used in conjunction with advice relating to the specific action concerned.

Information for applications under the experimental Key Activity 4 for 'Dissemination and Exploitation of Results' is provided in the [Key Activity 4](#) section.

### 5.A. WHAT IS DISSEMINATION AND EXPLOITATION OF RESULTS?

#### *What is the rationale for the dissemination and exploitation of results?*

Systematic dissemination and exploitation of results are critical in helping to maximise the impact of activities undertaken under this and previous EU education and training programmes in support of the revised [Lisbon agenda](#) and delivery of the '[Education and Training 2010](#)' Work Programme. Benefits can include:

- improving the [sustainability](#) of project results, in line with end-user needs
- generating savings by exploiting existing practices (no 're-inventing the wheel')
- capitalising on investments
- transferring results in order to transform systems and practices, thus enhancing the impact of EU-funded programmes and projects at systems level
- reducing time-scales for policy and process innovation
- feeding the policy process ([peer learning](#), [Open Method of Coordination](#)).

#### *What is meant by "dissemination and exploitation of results"?*

'Dissemination and exploitation of results' refers to activities designed to ensure that the results of the LLP and its predecessors are appropriately recognised, demonstrated and



implemented on a wide scale. Within the context of the LLP, the following distinctions should be observed:

- **Promotion and awareness-raising:** This term is used primarily in the context of publicising the existence of programmes and initiatives, their aims, objectives and activities and the availability of funding for given purposes. This definition excludes the publicising of *results*. As such, promotion and rising awareness occurs primarily before and during the actual implementation of the programmes or initiatives, and is undertaken by DGEAC in cooperation with the Education, Audiovisual and Culture Executive Agency and the National Agencies.
- **Dissemination:** This is defined as a planned process of providing information on the quality, relevance and effectiveness of the results of programmes and initiatives to key actors. It occurs as and when the results of programmes and initiatives become available. This activity happens at both project and programme level, and involves the active participation of intermediary 'relay' bodies.
- **Exploitation** consists of '**mainstreaming**' and '**multiplication**'. 'Mainstreaming' is the planned process of transferring the successful results of programmes and initiatives to appropriate decision-makers in regulated local, regional, national or European systems. Multiplication is the planned process of convincing individual end-users to adopt and/or apply the results of programmes and initiatives.<sup>23</sup> Again, this can happen at both project and programme level.

'Dissemination' and 'exploitation' are therefore distinct concepts, but closely related to one another. The keys to a successful exploitation of results are:

- producing relevant results from projects and programmes/initiatives to satisfy the demands of providers, policy-makers and ultimately society more generally;
- ensuring, through the use of effective dissemination and exploitation, that such results reach the right target audiences in a format and at a time which enables them to benefit from them.

#### Is this the same as valorisation?

Yes, it is. 'Valorisation' is the French equivalent term for 'dissemination and exploitation of results'. The two terms are sometimes used interchangeably in English in the context of the EU Lifelong Learning Programme and its predecessors.

#### What are results?

The expression 'results of programmes and initiatives' encompasses the results of individual projects, events, activities, periods of mobility, etc. These can be categorised into [five main types](#): products, methods, experiences, policy lessons and European cooperation.

Further information concerning DG EAC's strategy for the dissemination and exploitation of project and programme results and related activities can be found on the DG's 'Dissemination and Exploitation' webpage at the following address:

[http://ec.europa.eu/dgs/education\\_culture/valorisation/index\\_en.html](http://ec.europa.eu/dgs/education_culture/valorisation/index_en.html)

#### Who is this information for?

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<sup>23</sup> Definitions of mainstreaming and multiplication have been adapted from *Guide to Achieving Impact for Project Promoters*; EMPLOYMENT Community Initiative; DG Employment and Social Affairs (1997).



- Applicants applying for multilateral projects under the sectoral programmes must include a detailed dissemination and exploitation plan as part of their application.
- Applicants applying for funding under the other Actions of the sectoral and transversal programmes should check whether the specific requirements include dissemination and exploitation activities and plans. The general guidelines and 'checklist' may in any case prove useful to applicants under any part of the LLP in helping to improve the focus on project results and impact.

*Key information for preparing a quality dissemination and exploitation plan*

All applications for multilateral projects must include a clear, detailed and quantified dissemination and exploitation plan. This is one of the most aspects when assessing proposals. Consequently, a poor quality strategy for the dissemination and exploitation of the intended results will have a negative impact on the proposal's chances of being selected.

A good dissemination and exploitation plan should address the following points in particular:

- **A clear and dynamic focus on user needs**  
Proposals should be based on a clear and well-argued presentation of the analysis of user needs for the target groups concerned and the results proposed in response to those needs. The dissemination and exploitation plan should set out how this analysis will be reviewed and updated during the project lifetime to ensure the results remain relevant to the targeted end users' requirements. The plan should also indicate scanning activities to identify broader target groups with a potential interest in the results, as well as measures to capture and respond to the needs of these wider groups where possible (transfer potential of the end results).
- **Shared responsibility across all partners**  
Responsibility for the dissemination and exploitation of results lies with the whole partnership in their capacity as the repository/owner of those results. All project partners should therefore take an active part in implementing the measures set out in the exploitation plan. Exploitation of results should not be seen as the exclusive reserve of those partners who offer specific marketing expertise and dissemination capacity. The plan should set out clearly the specific tasks falling to each partner during the course of the project and in line with their particular interests and expertise.
- **A continuing process**  
Activities for the dissemination and exploitation of results should be conceived and planned from the very outset of the project proposal, for example as a tool for developing and testing the design of the proposal, and should run through the whole of the project life-cycle to ensure that the end results are as relevant, applicable, visible and accessible as possible.
- **Life after the end of the project**  
Dissemination and exploitation plans should include activities designed to ensure the continuing visibility, accessibility and use of the results after the end of the project, to ensure maximum impact and sustainability.

## 5.B. BUILDING A DISSEMINATION AND EXPLOITATION STRATEGY AND PLAN

### Checklist for Project Applicants

#### Needs Analysis

- Does the project include a satisfactory ex-ante analysis of the needs it is intended to meet?  
Consultation of future known and potential users/beneficiaries of the project results is fundamental at this stage.
- Does the project incorporate an accurate analysis of the state of play in the proposed field of activity?  
This is important to show the project's added value and to avoid any redundancy; SWOT<sup>24</sup> analysis may be useful at this stage.
- Are the needs of final beneficiaries and of the potential users of the results taken into account both in the planning and design phases and during the project's implementation? Are they kept informed and involved in the activities from the outset?

#### Partnership / Consortium

- Does the project provide for a stable Partnership/Consortium? Is the Partnership/Consortium based on existing/previous cooperation? Is it part of a medium and/or long-term cooperation between the partners? Where mainly new partners are involved, does the project include specific actions to develop and reinforce cooperative working?
- Does the Partnership/Consortium provide for links (directly or via reliable relays and networks) with the most representative decision-makers/stakeholders and professionals in the fields targeted by the project?
- Does the Partnership/Consortium include organisations expected to incorporate the project outcomes in educational, vocational, culture or youth systems/practices at national, regional and/or sectoral level?
- Can the project partners demonstrate their ability and readiness to ensure that the results will be followed up after completion of the project? (i.e. updating, implementation, continuous dissemination, transfer, follow up activities etc.)
- Do the partners have professional experience in dissemination / publishing / communication / marketing?
- Has provision been made for an agreement between the partners on intellectual property rights?

Such an agreement is not compulsory, but could prove useful. In all events, it must not prevent any future use of the product by third parties, while abiding by the right to commercialise the product.

#### Dissemination and Exploitation Activities

- Do dissemination and exploitation activities form a continuous process throughout the project?

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<sup>24</sup> SWOT = strengths, weaknesses, opportunities, threats (planning activities in the light of identification of strengths, weaknesses, opportunities and risks connected with the project, the partners and the external conditions).



Dissemination and exploitation activities should commence at the start of the project and continue throughout its implementation and beyond the end of the contract, thus supporting the longer-term impact and sustainability of the project results.

- Are dissemination and exploitation activities detailed, clear and quantified?  
Examples: number of persons targeted by and benefiting from the dissemination and exploitation activities, budget percentage earmarked for dissemination and exploitation, any dissemination/exploitation activities directed at other multipliers, means for dissemination and exploitation in the long term such as scientific articles, conference proceedings, Internet sites, commercialisation, agreements with users of the results for long-term exploitation; and in the short term, the media, seminars, conferences, exhibitions, test phases of prototypes with potential users/beneficiaries of the result
- Are the dissemination and exploitation activities adapted to and suitable for the project goals and beneficiaries? Are the dissemination channels adequate to the target group?
- Are dissemination and exploitation activities organised at different levels (i.e. local, regional, national, European and sectoral levels) via efficient relays such as (transnational) networks?
- Do all the project partners share responsibility for dissemination and exploitation? If not, why not? Are roles clearly defined and tasks clearly and appropriately allocated among partners?
- Is there continuous interaction between project partners and known and potential end users/beneficiaries of the results?  
The project's direct beneficiaries are the parties towards whom the project results are directly targeted, but provision should also be made for dissemination and exploitation activities among a broader group of potential users/beneficiaries, political decision-makers and/or key players in the project's fields of activity.
- Are end users and potential beneficiaries of the results directly involved in the different stages of the project and are they consulted regularly in the course of the project?  
Their advice and requirements are essential with a view to producing an immediately useable, quality output with a higher impact potential. The users may be involved at different stages, for example, when specifying and reviewing requirements, when testing the prototype, and in the assessment of interim and final results. This involvement is important to allow adaptation of the results and possible reshaping of certain project activities. End users and final beneficiaries could be involved via the official partner agreement, as silent partners, as members of a project steering committee or focus group etc.).
- Does the project include for example a product test stage before finalisation with the final beneficiaries / end users?  
The results of the test should be taken into account in adapting and finalising the product.

#### Follow Up

- What happens when the project ends? Is it planned to update the results after the project has been completed? How will access to the results be assured after



completion of the project? How will necessary updating be funded? If the product requires some elements of customer support, how will this service be provided?

- Has provision been made for passing on the project results to other potentially interested persons and organisations, and in particular to decision-makers and key stakeholders?

The ideal goal is to have results incorporated into systems and practices, for example by having them recognised/certified in the case of training/educational tools. Involvement at policy-making level is therefore essential to the results' sustainability.

Transfer of the results and methodologies developed by a project for use in other organisations is also vital. Relaying these by the use of training courses organised by project partners or other suitably qualified organisations is highly recommended.

- Could the expected results (products and processes) be transferred to and exploited in other sectors/target groups/social and cultural environments? Could the transferability of the results be improved?

Examples - product easy to use from the technical point of view, product includes plans for maintenance and follow-up after completion of the project; process bringing new approaches to training; outputs aimed at target group not currently covered; product designed in such a way that its content and/or its technology can be easily adapted; processes solving European-scale problems; outputs available in several languages, etc.

### 5.C. GENERIC TYPOLOGY OF PROJECT RESULTS

Results can be categorised into five main types, of which the first three are direct project results and the second two are indirect project results and/or the results of programmes and initiatives.

- 1) '*Products*' are tangible and durable outputs in the form of new learning products, new curricula, new qualifications, videos, etc. They include:
  - reports and (comparative) studies;
  - traditional education and training modules like handbooks and other training tools;
  - innovative education and training modules
  - new curricula and qualifications;
  - guidance material to new approaches and methodologies;
  - online education and training material (e-learning);
  - events such as conferences, cultural events, youth gatherings, public awareness campaigns, seminars, debates and symposia.
- 2) '*Methods*' include:
  - increased knowledge of the participants within a certain field and topic;
  - cooperation processes and methodologies;
  - managerial lessons learned and know-how;
  - exchange of ideas and good practice.
- 3) '*Experiences*' are intangible and potentially less durable than products and methods. They include:
  - experience gained by the project partners in the management and undertaking of (trans-national) partnerships;
  - experience gained by individuals, for example, experience gained from mobility periods within the sectoral programmes of the LLP;



- exchange of experience and best practice through the establishment of networks, notably under the centralised actions of the LLP;
  - experience gained from the practical "Partnership"-type projects within the LLP's sectoral programmes, etc.
- 4) '*Policy Lessons*' usually emerge from the overall experience of projects within a programme or initiative (or group of programmes or initiatives) or from specific projects that are particularly innovative or effective. They are applied more widely at 'systems' level by multiplier agents. The generation of policy lessons is unlikely to be the primary consideration of project coordinators (and partners) or their main reason for participating in an EU programme or initiative, but some of them may nonetheless be very relevant and rich in potential for this purpose.
- 5) '*European Co-operation*' as a means, in part, to increase awareness about the benefits to be derived from cooperating with European partners and improve its visibility but also to reinforce actions at EU level. It includes:
- new or extended European partnerships;
  - transnational sharing of experience and best practice;
  - cross-cultural dialogue and co-operation, development of inter-cultural competence;
  - in certain circumstances, new dialogue and partnerships between EU and non-EU countries.

## 5.D. PUBLICITY

All grants awarded under the "Commission Procedure" (centralised actions) in the course of a financial year must be published on the Internet site of the EU Institutions during the first half of the year following the closure of the budget year in respect of which they were awarded. This information may also be published using any other appropriate medium, including the Official Journal of the EU. The names of individuals who have received a grant will not, however, be published in the Official Journal or on the Europa website.

For legal entities which receive a grant:

- a) the following information will be published<sup>25</sup>:
- name and address of the beneficiary;
  - subject of the grant;
  - amount awarded and rate of funding;
  - The list of partner organisations
- b) they must clearly acknowledge the EU's contribution in all publications or in conjunction with activities for which the grant is used. Furthermore, they are required to give prominence to the name and logo of the European Commission on all their publications, posters, programmes and other products realised under the co-financed action. Finally they need to publish a disclaimer that makes it clear that responsibility for the content lies with the consortium and not with the European Commission or its

<sup>25</sup> The application forms and partner letters include an explicit agreement from the applicant allowing the Commission or the Agency to publish the above-mentioned data if the grant application is approved. However, a beneficiary may request an exemption from this provision if publication would jeopardise its security or financial interests.



agencies. If this requirement is not fully complied with, the beneficiary's grant may be reduced;

- c) they are required to make available on-line the description of the action and its interim and final results via a website to be maintained during the project or/and the European Commission-supported informatics platforms devoted to project dissemination of the programme (EVE, ADAM, etc), for a set period after its completion. The website details should be notified to the relevant Agency at the beginning of the action and confirmed in the Final Report.

### 5.E. PROTECTION OF PERSONAL DATA

The grant application will be processed by computer. All personal data (such as names, addresses, CVs, etc.) will be processed in accordance with Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the EU institutions and bodies and on the free movement of such data<sup>26</sup>. Information provided by the applicants necessary in order to assess their grant application will be processed solely for that purpose by the department responsible for the programme concerned. On the applicant's request, personal data may be sent to the applicant to be corrected or completed. Any question relating to these data, should be addressed to the appropriate Agency to which the application form must be returned. Beneficiaries may lodge a complaint against the processing of their personal data with the European Data Protection Supervisor at any time at: <http://www.edps.europa.eu/EDPSWEB/>.

*For more general information and guidance concerning DG EAC's strategy for Dissemination and Exploitation of Results, please see:*

[http://ec.europa.eu/dgs/education\\_culture/valorisation/index\\_en.html](http://ec.europa.eu/dgs/education_culture/valorisation/index_en.html)

<sup>26</sup> Official Journal L 8, 12.1.2001.