EUROPEAN COMMISSION
Directorate-General for Education and Culture

Life Long Learning: Education and Training, Programmes and Actions
Director

NOTE FOR THE ATTENTION OF THE SOCRATES COMMITTEE MEMBERS

The Community Action Programme in the Field of Education Socrates

GENERAL CALL FOR PROPOSALS 2006 EAC/32/05
(Text with EEA relevance)

(closing date for certain Actions is 1 November 2005)

I. <u>INTRODUCTION</u>

The decision establishing the second phase of the Socrates programme was adopted by the European Parliament and Council on 24 January 2000 (Decision No. 253/2000/EC). The programme covers the 2000 - 2006 period and has a budget (EU 15) of € 1850 million. In view of the enlargement of the EU this global budget has been increased up to € 2.060 million (EU 25).

In addition to the 25 Member States of the European Union, the programme is also open to participation by the EFTA-EEA countries[1] within the context of the Agreement on the European Economic Area, as well as the candidate countries[2]. Applications may be submitted with regard to activities involving persons and institutions in all of these countries. Grants will be awarded in respect of participation of those countries which are not EU Member States provided that the relevant financial contributions of these countries are paid.

The Socrates programme promotes co-operation under the Actions, summarised below. More detailed descriptions can be found in the *Socrates Guidelines for Applicants[3]*.

- **Comenius** seeks to enhance the quality and reinforce the European dimension of **school education** by encouraging transnational co-operation between schools, and institutions involved in teacher education. It promotes opportunities for education staff to undertake mobility during initial and / or in-service training, intercultural awareness, and language learning.

- **Erasmus** seeks to enhance the quality and reinforce the European dimension of **higher education**, by encouraging transnational co-operation between higher education institutions, promoting mobility for students and higher education teaching staff, and improving transparency and academic recognition of studies and qualifications throughout the Union.

- **Grundtvig** seeks to enhance the quality, European dimension, availability and accessibility of **lifelong learning** through **adult education** in the broadest sense, to promote improved educational opportunities for those leaving school without basic qualifications, and to encourage innovation through alternative learning pathways. In addition to learning within the formal educational system, this also includes learning that takes place on a non-formal, informal or autonomous basis.

- **Lingua,** for the **teaching and learning of languages,** supports the other Socrates Actions through measures designed to encourage and support linguistic diversity throughout the Union, to contribute to an improvement in the quality of language teaching and learning, and to promote access to lifelong language learning opportunities appropriate to each individual's needs.

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[1] Iceland, Liechtenstein and Norway.
[2] Bulgaria, Romania and Turkey.
[3] For examples of projects funded under the centralised Actions of the Socrates programme please consult the ISOC database at: www.siu.no/ISOC

- **Minerva** promotes European co-operation in the field of **Open and Distance Learning (ODL) and Information and Communication Technology (ICT) in education**. It does so by promoting a better understanding among teachers, learners, decision-makers and the public at large of the implications of ODL and ICT for education; by helping to ensure that pedagogical considerations are given proper weight in the development of ICT and multimedia-based educational products and services; and by promoting access to improved methods and educational resources in this field.

- **Observation and innovation in education systems and policies** contributes to improving the quality and transparency of education systems and furthering the process of educational innovation in Europe through the exchange of information and experience, the identification of good practice, the comparative analysis of education systems and policies, and the discussion and analysis of matters of common educational policy interest. Alongside other activities, this Action includes support for the **Eurydice** and **Naric** networks, and the **Arion** study visits.

- **Accompanying measures** supporting a range of initiatives that contribute to the overall objectives of the programme, by means of awareness-raising and information activities, valorisation activities (dissemination and exploitation or results), training activities, and activities undertaken by associations or non-governmental bodies.

This document provides specific information for the 2006 call for proposals that complement the generic information given in the *Socrates Guidelines for Applicants*. Any further information may be obtained from the National Agencies (see Chapter VI)

Grants are also available to enable appropriate members of staff from eligible institutions to undertake **preparatory activities** in another participating country in order to lay the foundations for future projects or networks. Details of these grants are available from National Agencies

Chapter III presents the specific priorities pertaining to the 2006 general call for proposals for both the decentralised (managed by National Agencies) and centralised activities (managed by the Executive Agency set up in Brussels by the European Commission). It is to be noted that, in 2006, proposals for transnational projects are expected to foresee both "*valorisation*" and "*thematic monitoring*" activities:

- *"Valorisation"* activities, i.e. activities covering the dissemination and exploitation of the expected results from a project, should be made explicit in the proposal, which should also include an in-depth analysis of the needs of the prospective users. Applicants are encouraged to consult the new valorisation page on the Socrates website for further information:

  http://europa.eu.int/comm/education/programmes/socrates_en.html

- "*Thematic monitoring*" activities aim at creating synergies, exchange of experience and mutual learning among projects working on the same theme in a given Socrates action (Comenius, Grundtvig, Minerva). They cover both an annual meeting of projects working in the same field, in order to cooperate rather than work in a stand-alone environment, and voluntary virtual meetings as judged appropriate by the projects.

Chapter IV provides information on the indicative budget to be allocated to each of the Socrates actions, as well as the indicative average grant per project.

Chapter V provides the table of closing dates for submission of proposals for the different Socrates actions.

II.   THE ROLE OF THE ANNUAL CALL FOR PROPOSALS

The *Socrates Guidelines for Applicants* (edition of June 2004), which are available at the addresses indicated in Chapter VI below, contain a full description of the Socrates programme, the target groups and the grants available under each of the programme's Actions.

In the case of the Actions managed on a decentralised basis there may be national annual priorities applicable to specific countries only. These national priorities are complementary to but may not replace the general European priorities mentioned below (Chapter III).

The present annual **Call for Proposals 2006** sets out important additional information such as the closing dates for submitting applications (see Chapter V), general action lines (see Chapter III), any modifications to the *Socrates Guidelines for Applicants*, and – following the entry into force of the new Financial Regulation applicable to all Community spending - a set of exclusion criteria (see Chapter IV) and financial rules (see ChapterIV.1).

The *Socrates Guidelines for Applicants* (edition June 2004) and the Call for Proposals 2006 should therefore be read in conjunction with one another.
These two texts, together with the Financial regulation (see chapter IV.1), contain all the information needed in order to apply for Socrates grants.

III.   GENERAL ACTION LINES

The *Socrates Guidelines for Applicants* (see websites under Chapter VI below) set out the eligibility criteria, exclusion, selection and award criteria and priorities of a more permanent nature that are applied when assessing requests for financial support within the programme.

A number of significant policy developments relevant to the Socrates programme have taken place, in particular in relation to the future challenges to education and training systems and Lifelong learning.

A joint "detailed work programme"[4] of the European Commission and the Council, which aims at implementing the report on the "**Concrete future Objectives of education and training Systems**"[5] was adopted by the Education Council in February 2002. A Council resolution on **lifelong learning** which followed the Commission's 2001 Communication "Making a European Area of Lifelong Learning a Reality"[6] was adopted in May 2002 and set out a wide range of follow-up actions.

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[4]   14/02/2002, Council 6365/02 EDUC 27
[5]   12/02/2001, Council 5980/01 EDUC 18
[6]   COM(2001) 678 final

These policy initiatives are being implemented by means of the "Integrated Approach" focussing on eight thematic activities:

- teacher and trainer education;
- basic skills, foreign language teaching, entrepreneurship;
- information and communication technology (ICT) in education and training;
- increasing participation in maths and science;
- resources and investment;
- mobility and European co-operation;
- open learning environment, active citizenship, inclusion;
- making learning attractive, strengthening links with working life and society.

Applications submitted under Socrates are expected to play an important role in supporting the implementation of these priority themes, as they are entirely consistent with the programme's objectives.

Within the broad context provided above, the following **Action-specific priorities** will be applied to the General Call for Proposals 2006.

<u>COMENIUS – SCHOOL EDUCATION</u>

<u>Decentralised actions</u>

- **Comenius 1** (School Partnerships) (Indicative 2006 budget : 75 millions €, of which 25% for Language projects)

The *Guidelines for Applicants* describe the three types of project supported, and the eligibility criteria for each. In addition, applicants should note the following:

In 2006 priority will be given to applications from schools aiming at implementing the Action Plan on Promoting Language learning and Linguistic Diversity, in particular from schools wishing to introduce a Content and Language Integrated Learning (CLIL) approach.

(http:/www.europa.eu.int/comm/education/doc/official/keydoc/actlang/act_lang_en.pdf) -

- **Comenius 2.2 individual mobility grants for teachers and student teachers (Indicative 2006 budget : 19 million €)**

Applicants for in-service training grants should note that the Socrates Guidelines for Applicants are modified as follows : "National Agencies may also approve applications for active participation in a conference or seminar organised by a Comenius Network or by a genuinely representative European association active in the field of school education. In such cases, the training may last less than 1 week," whereas the duration of such grants is normally from a minimum of one week (5 full working days excluding time for travel), to a maximum of four weeks.

Applicants for all Comenius 2.2 individual mobility grants may request support for linguistic preparation in the language of the host country before travelling abroad, except in the case of in-service training in the field of foreign languages. Such preparation might include, for example, purchase of self-study materials, or participation in language classes.

Successful applicants for Comenius Language Assistantships are eligible to apply for Comenius support to take part in Erasmus Intensive Language Courses if a course session is organised close enough to the Assistantship start date to make participation possible.

Centralised actions

The *Guidelines for Applicants* describe the types of support provided and the eligibility criteria for each. In addition, applicants should note the following:

> **Comenius 2.1** European co-operation projects for the training of school education staff (Indicative 2006 budget : 10,9 million €)

In 2006, priority will be given to support projects focussing on:

- The implementation of the Action Plan on Promoting Language learning and Linguistic Diversity
  (http:/www.europa.eu.int/comm/education/doc/official/keydoc/actlang/act_lang_en.pdf)

- The contribution of teacher education and training to the Lisbon strategy ("Education and Training 2010") in the following areas :
    - the continuum of the teaching profession, from initial teacher education to induction and continuing professional development, ;
    - development of partnership approaches between teacher training institutions and the wider world which emphasise experience-based learning (links between school and the worlds of research, business, and society at large)
    - approaches designed to encourage teachers to develop new pedagogical methods to increase pupil motivation.

For projects on the contribution of teacher education and training to the Lisbon strategy ("Education and Training 2010"), applicants may refer to the publications and reports available on the dedicated web page of the European Commission : http://europa.eu.int/comm/education/policies/2010/et_2010_en.html. Applicants should take into account the latest recommendations from the relevant expert groups available on this page.

- Teachers' language learning as a means to promote teacher mobility by enhancing teachers' confidence in their language skills and thereby reducing their reluctance to be mobile.

➢ **Comenius 3** (Comenius networks) (Indicative 2006 budget : 4 million €)

In 2006, new networks will be supported in the following 12 areas, related to thematic priorities which are not covered by existing Comenius networks:
- involvement of parents in school education;
- needs of disabled persons in school education;
- health education;
- physical education;
- intercultural education;
- educational use of ICT;
- cultural heritage;
- school and the world of work;
- environmental education;
- evaluation of quality in school education;
- fight against violence at school;
- fight against racism and xenophobia in school education.

Co-operation between Comenius networks and Erasmus and / or Grundtvig networks within the same thematic area or covering a number of closely related thematic areas will also be supported. .

Further information

Applicants are encouraged to consult the Comenius website for further information, including examples of activities supported:

http://europa.eu.int/comm/education/programmes/socrates/comenius/index_en.html

ERASMUS – HIGHER EDUCATION

For all Erasmus activities, priority will be given to projects which:

- contribute to the realisation of the European Higher Education Area ("Bologna process"), aiming at greater compatibility and comparability of the systems of higher education and enhancing the attractiveness and competitiveness of European higher education institutions;

- foster a substantial increase in student and staff mobility while improving the quality of the mobility (academic, financial and other facilities);

- develop integrated study programmes at bachelor, master and doctoral level, including the use of distance learning;

- promote the consistent use of the instruments of the new Europass, the single Community framework for the transparency of qualifications and competences[7];

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[7] Decision of the European Parliament and the Council of 15 December 2004 (OJ L390/6 of 31.12.2004)

- present links and synergies between Erasmus activities and projects supported by the Jean Monnet action, the Erasmus Mundus and Leonardo da Vinci programmes and the Framework programme for Research and Technological Development.

Decentralised actions

ERASMUS 2: Student and teaching staff mobility(Indicative 2006 budget: 190,6 mio €)

Institutions participating in Erasmus should be conscious of the key role that student and teaching staff mobility play in the realisation of the European Higher Education Area. They are invited to further stimulate mobility in order to reach the objective of 3 million Erasmus students by the year 2011.

The quality of the arrangements for mobility is an important issue. Institutions are requested to ensure high quality in organising student and staff mobility as detailed in the Erasmus University Charter.

Besides the general selection criteria, in the first half of 2006 national authorities may decide on certain priorities for the mobility of students and teaching staff, for instance subject areas, destination countries, etc. National Agencies can provide information on such priorities.

Centralised actions

ERASMUS 1: Curriculum development projects (CD) (Indicative 2006 budget : 11,8 millions € covering also Intensive programmes)

Support will be given to projects aiming at:

- developing or revising "joint" programmes of study covering a complete degree cycle. After the development phase of one or two years, these programmes would be delivered by partner institutions in a genuinely integrated manner, involving student and staff mobility, joint delivery of parts of the course (intensive programmes), agreement on admission criteria, learning outcomes (competencies), assessment, quality assurance and recognition (use of the European Credit Transfer System (ECTS) and of Europass instruments such as Diploma Supplement (DS). The students would receive multiple or joint degrees, recognised by the participating institutions and countries. Joint programmes may concern first cycle (bachelor), second cycle (master) or third cycle (doctoral) studies. Priority will be given to joint programmes at second cycle (master) level;

- the development or revision of "single" programmes of study. In these projects, which do not focus on integrated delivery, partner institutions co-operate to develop programmes which fit the Bologna format and address educational and societal needs;

- the development of curricula which also include a mechanism for the future exchange of students and/or teaching staff between the partner institutions

- at developing a common approach towards curricular quality assurance and which establish a system of trans-national quality assurance of the curriculum.

All CD development projects should include a clear plan for the dissemination and exploitation (valorisation) of products and results.

ERASMUS 1: Intensive programmes (IP)

Support will be given to projects aiming at:
− respond to new needs and challenges emerging at European level and present a strong multidisciplinary approach;
− constitute an integral part of joint programmes of study, delivered by partner institutions in a genuinely integrated manner;
− describe precisely the mechanism of academic recognition and the corresponding ECTS credit points of the IP;

ERASMUS 3: Thematic Networks (Indicative 2006 budget : 6,4 million €)

Priority will be given to projects which:

- map and update the state of the art in their field (including rare fields of expertise in terms of knowledge, human resources and locations) and explore ways to foster more European cooperation;

- define and update generic and subject-specific competences using the method of the Pilot Project "Tuning Educational Structures in Europe";[8]

- promote synergies between teaching and research by encouraging universities to integrate research results in their teaching and link Socrates-Erasmus TNs with the networks funded by the Research DG;

- aim at study areas which are not addressed so far by projects in this Action : Economics, Literature, Philosophy and Mathematics;

- map and check "rare knowledge" in any given discipline or transversal subject setting up a list of disappearing teaching methods and notions.

- contribute to the development of networks of the scientific and humanistic networks participating in the appropriate workshops and conferences.

- make provision for the participation of a small group of students in the annual meetings.

Co-operation between Erasmus networks and Comenius and / or Grundtvig networks within the same thematic area or covering a number of closely related thematic areas will also be supported.

Further information

Applicants are encouraged to consult the Erasmus website for further information, including examples of activities supported:

http://europa.eu.int/comm/education/programmes/socrates/erasmus/erasmus_en.html

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[8]   www.relint.deusto.es/TuningProject/index.htm , www.let.rug.nl/TuningProject/index.htm

GRUNDTVIG – ADULT EDUCATION AND OTHER EDUCATIONAL PATHWAYS

Decentralised Actions

The *Guidelines for Applicants* describe the types of support provided and the eligibility criteria for each. In addition, applicants should note the following:

Grundtvig 2- Learning Partnerships (Indicative 2006 budget : 15,6 million €)

Support will be provided for projects with strong involvement of adult learners and which show a clear potential to become a vehicle for the exchange and dissemination of good practice and experience. National Authorities are encouraged to give particular priority to applications from organisations which have not yet participated in Grundtvig.

Grundtvig 3- Individual training grants for staff (indicative 2006 budget : 1,6 million €)

Particular attention will be given in 2006 to persons wishing to participate in the Grundtvig Training Courses under "Grundtvig 1.1" and Grundtvig Thematic Seminars under "Grundtvig 4.1".

Centralised Actions

Under these Actions, support will be provided for projects and networks which have a clearly demonstrated potential to **generate innovation** and / or to **disseminate innovation and good practice** between different parts of Europe, whether or not this good practice has been developed by Socrates / Grundtvig projects.

The *Guidelines for Applicants* describe the types of support provided and the eligibility criteria for each. In addition, applicants should note the following:

Grundtvig 1: European Projects (indicative 2006 budget : 15,1 million €)

In 2006, two distinct types of project will be supported, (1) European Cooperation Projects and (2) Grundtvig Training Courses, as set out below. Priority will be given to the Grundtvig Training Courses.

(1)   European Cooperation Projects ("Grundtvig 1")

In 2006, only projects submitted in the following themes will be supported:

- Teaching and learning of foreign languages, regional and minority languages, and the languages of migrants and ethnic minorities in adult education;

- Learning in later life; Inter-generational learning;

- Parental and family learning;

- Strategies to promote effective alternative pathways into formal education, including access pathways to higher education for persons without formal entrance qualifications;

- Promoting adult citizens' awareness of Europe;

- Professionalisation of adult education (initial and in-service training of adult education teachers and other staff; quality assurance of services and institutions);

- Relationship between general and vocational education; workplace-based general learning;

- Adult education for marginalised or disadvantaged citizens, notably prisoners and ex-offenders, refugees and asylum-seekers;

- Health education, including sport;

- Mathematics and sciences.

(2)   Grundtvig training courses for adult education staff ("Grundtvig 1.1")

Projects developing a Training Course can have a maximum duration of two years. While the first year will normally be devoted to developing / updating the course, the second year should focus on testing the course with participants from the countries participating in the project itself, if possible in different countries and using various languages, and on organising the course on at least two occasions as an offering to Grundtvig 3 applicants Europe-wide. Travel and subsistence costs for the participants outside the partnership will be covered by Grundtvig 3 grants and therefore should not be included in the Grundtvig 1 project proposal budget.

Priority will be given to proposals for Training Courses in the thematic areas indicated under European Cooperation Projects above, but good quality Courses on other topics may also be supported.

Grundtvig 4: Networks and Thematic Seminars (Indicative 2006 budget: 1,3 million €)

In 2006, two distinct types of grants will be awarded:

(1)   Grundtvig Network grants ("Grundtvig 4")

In 2006, new networks will be supported in the following thematic areas:
- Language learning in adult education
- Basic skills
- Adult learning opportunities for the disabled
- Adult learning opportunities through sport
- Art and Culture
- Education in prisons; education for social reinsertion of offenders
- Education in hospitals
- Gender issues in adult education.

Applicants are strongly encouraged to consult the information note which accompanies the call and will be made available during August 2005.

In addition, the Commission will consider applications for the co-funding of new work programmes of Grundtvig Networks for the period after the end of their present grant agreements, in the light of the proven performance of the Networks concerned.

In order to be selected, Grundtvig 4 network proposals should in particular demonstrate a partnership which is geographically broad-based and composed of strong and representative organisations with the potential to have a genuine multiplier function.

Co-operation between Grundtvig networks and Comenius and / or Erasmus networks working in similar thematic areas, is encouraged.

(2) Grundtvig Thematic Seminars ("Grundtvig 4.1")

Under this heading, one-year grants will be made available to help pave the way towards the creation of Grundtvig 4 networks in thematic areas where such a network does not currently exist. Priority will be given to the same topics as those indicated under (1) (Grundtvig Network grants) above.

The grants will support the organisation of seminars, workshops or other events ("Grundtvig thematic seminars") designed to help 'valorise' the results generated (and methodologies used) in particular by projects previously supported under Grundtvig 1 and 2 or the adult education action within Socrates I, but also other innovative experiments on the theme in question funded from other sources.

In selecting the proposals for support, the Commission will take into account, the extent to which the proposed Grundtvig Thematic Seminar(s) appear(s) likely to:

- give rise to a proposal for a Grundtvig 4 Network of good quality within a clear timeframe (normally by the closing date for Grundtvig 4 pre-proposals relating to 2008 – subject to the availability of this closing date under the programme arrangements which will replace Socrates from 2008);

- contribute significantly to the valorisation of project results and methodologies in the thematic field concerned.

Further information

Applicants are encouraged to consult the Grundtvig website for further information, notably in order to familiarise themselves with projects and networks previously supported:

http://europa.eu.int/comm/education/socrates/adult/home.html

LINGUA – LANGUAGE TEACHING AND LEARNING

Centralised actions

Lingua 1: Promotion of Language Learning (Indicative 2006 budget : 2,6 million €)

Lingua 1 projects should cover one or more of the following 4 themes:

- networking of Lingua projects that have developed complementary tools and methodologies;

- dissemination of information about successful practices to other institutions and key decision-takers across Europe;

- the promotion of multilingual comprehension between languages of the same linguistic family;

- the promotion of languages at places frequented by the general public (exhibitions, sporting, cultural or gastronomic events, festivals, tourist attractions, airports, shopping centres, etc).

Please note the two following requirements:

- Projects should establish a coherent strategy for ensuring the dissemination and exploitation (valorisation) of the results of the project;

- Projects where the development of a website is an important feature will need to demonstrate how it will continue to be maintained and managed after the end of the contractual period with the Commission.

Lingua 2: Development of tools and materials (Indicative budget 2006 :4 million €)

Applicants should submit projects that take into account the objectives of the Action Plan on Promoting Language Learning and Linguistic Diversity (http://europa.eu.int/comm/education/policies/lang/policy/index_en.html) related to Lingua 2, namely:

- Projects to develop materials for teaching less widely used and less taught languages, to primary and pre-primary learners;

- Projects for the development and valorisation of new, specific methodologies for teaching subjects through less widely used and less taught languages;

- Projects promoting multilingual comprehension between languages of the same linguistic family.

Please note:

- Projects targeting the shortages of materials for the teaching and learning of languages for specific vocational purposes must be presented under the Leonardo da Vinci programme and not under Lingua;

- Dictionaries and data bases are not considered in themselves to be language learning tools, and therefore their production does not fall within the scope of this Action;

- Projects where the development of a website is an important feature will need to demonstrate how it will continue to be maintained and managed after the end of the contractual period with the Commission;

- The teaching of a national language of a given country in its own territory (for instance to members of an immigrant community) is considered to be the teaching of a second language, and not of a foreign language, and therefore it is not eligible for funding in Lingua;

- As a general rule, no funding will be given to projects which aim to develop further or to continue on-going Lingua 2 projects before the original project has been completed and its final results evaluated by the European Commission.

Applicants are advised to consult the "Lingua Community" webpage at:

http://europa.eu.int/comm/education/programmes/socrates/lingua/community_en.html

for a description of current and former Lingua projects, so as to avoid presenting proposals that duplicate the work of earlier projects.

Applicants for Lingua 2 are also advised to consult the "Lingua Products" webpage at:

http://europa.eu.int/comm/education/programmes/socrates/lingua/products_en.html

MINERVA - OPEN AND DISTANCE LEARNING (ODL) AND INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) IN EDUCATION

Centralised actions

In 2006, the Minerva proposals will have to specifically fall under **one** of the four following actions:

1) Understanding innovation (Indicative 2006 budget : 2 million €)
Proposals addressing this action line must aim at improving understanding of the impact of ICT and/or ODL models on the organisation of learning/teaching and/or on the learning process as such. They may address classroom-based learning, distance learning modes, or the combination of both.
Proposals should contain elements of action-research and/or observation methodologies. Psychological, social, organisational, pedagogical or economic issues could all be subjects for thorough evaluation. Proposals concerned with carrying out comparative analysis or targeted studies may also be submitted. Analysis of the results of European cooperation in the field of ICT for Education will also be covered by this priority.

2) Designing, developing and testing new methods and educational resources (Indicative 2006 budget : 5 million €)
Proposals addressing this action line should aim at providing methods and tools necessary for the development of innovative learning environments.
Minerva does not aim at funding the development of multimedia materials and/or courses. Such activities may, however, be partially funded if they involve innovative cooperation experience or play a demonstrably vital role in attaining the objectives of the proposed work.
The methods, tools and resources should be of a generic nature, i.e. they should be easily transferable to other domains. Projects will be expected to demonstrate how such a transfer may be accomplished.

3) Providing access to existing resources (Indicative 2006 budget: 2 million €)
Proposals addressing this action line will be aiming at developing information services and systems on educational methods and resources involving the use of ODL and ICT, at a

European level. Such services should also take into account the existing information channels at regional, national and international level, and build on them whenever possible.

Specific projects may aim at providing a synthesis of the results of projects which have been selected under Socrates and other Community programmes on issues of common interest.

4) Activities to support the exchange of ideas and experience relating to ODL and the use of ICT in education (Indicative 2006 budget : 1 million €)

Proposals under this action line will be concerned with encouraging the establishment of links at European level between producers, users and managers of education and training systems. Projects or activities may be focused on specific issues such as the networking of resource centres, teacher training institutions, experts or decision-makers with a view to exchanging ideas and experiences.

In all proposals, clear plans should be given in terms of the cooperation activities and envisaged encounters, building on the strengths of the partners. Such activities might, for examples, include the organisation of conferences, workshops, fora, summer universities, etc. designed to help attain the objectives of the project and disseminate its results.

Use of ICT is essential for ensuring wide availability and the sustainability of such activities and it will therefore be regarded as a mandatory component of the proposal, including details of the way it is to be used.

General advice for project promoters

Applicants need to describe the content of their projects in concrete terms. They need to give information on how the innovative use of ICT underpins the approaches their projects want to test and validate. Projects should include innovative use of existing tools and technology for learning or more advanced applications in education. Applicants need to bear in mind the concrete "validation" of suggested approaches, against the background of the way educational institutions are organised in their respective countries. Particular attention may also be given to building bridges between research and implementation.

Evaluation and valorisation activities must also be considered as key components of the proposed projects, as they are essential for ensuring the transferability of the projects' outcomes in the given field..

Further information

Applicants are encouraged to consult the Minerva website for further information, including examples of activities supported:
http://europa.eu.int/comm/education/programmes/socrates/minerva/index_en.html

OBSERVATION AND INNOVATION

Observation of educational systems and policies (Socrates Action 6.1 and 6.2) (Indicative budget 2006: 2,4 million €)

This will be subject to a specific Call for Proposals, to be published in the fourth term of the year 2005, details of which are available at the addresses indicated in Chapter VI below. The priority themes will be closely related to the current political agenda of the European Union in the field of education and especially the « Detailed Work programme on the follow-up of the Objectives of education and training systems in Europe » (see Chapter III).

Arion study visits (Indicative 2006 budget : 2,8 million €)

In 2006, the themes will be more specifically linked to the key issues and topics for exchange of the "Objectives report" mentioned above. The detailed list of themes will be drawn to the applicants' attention by National Agencies along with the Arion programme announcement and the publication of the study visit catalogue in January 2006.

Further information

Applicants are encouraged to consult the Observation and Innovation website for further information, including examples of activities supported:

http://europa.eu.int/comm/education/programmes/socrates/observation/index_en.html

ACCOMPANYING MEASURES (Indicative 2006 budget : 1,5 million €)

Accompanying measures play an important role within and between the Actions of the Socrates programme. The common provisions for all sectors, are contained in the *Socrates Guidelines for Applicants*.

Priorities under the various educational sectors are set out in the *Guidelines*. In the case of higher education (Erasmus), the following specific priorities for Accompanying Measures will apply in 2006:

- Projects supporting the objective of 3 million Erasmus students by 2011 : financial support of mobility, services to students (e.g. accommodation), academic recognition, linguistic aspects of mobility, etc.

- Networking of Erasmus Thematic Networks and networking of Erasmus Curriculum Development Projects

- Continuous core role of Erasmus activities to achieve the objectives of the Bologna process.

IV. FINANCIAL SUPPORT

IV.1. General rules

Co-financing principle

The Socrates decision states in Annex IV.B.2 that: "*As a general rule, Community financial assistance granted for projects under this programme is intended to offset the estimated cost necessary to carry out the activities concerned and may cover a maximum period of three years, subject to a periodic review of progress achieved. In accordance with the co-financing principle, the beneficiary's contribution may take the form of the provision of the personnel and / or infrastructure necessary for the realisation of the project*". The grant agreement will therefore cover an expenditure period not normally exceeding three years. In exceptional cases the period may be extended up to sic months with written approval of the Commission. Participating institutions / organisations are therefore expected to respect this co-financing principle. The grant agreement will therefore cover an expenditure period not normally exceeding three years. Extensions of up to six months may be approved at the Commission's discretion without recourse to a formal exception procedure, if the extension is necessitated by circumstances beyond the project's control or if it is clearly demonstrated that the extension is necessary in order to optimise the utilisation and impact of the Community grant."

For centralised Actions except in the case of Accompanying Measures, the Community contribution will not normally exceed 75% of the total cost of any specific project. Participating institutions / organisations are to commit other resources to the project and to declare and provide evidence of such other sources of funding and the amounts involved.

The following information have to be read in conjunction with the Financial Regulation applicable to the general budget of the European Communities (further referred to as FR) and its Implementing rules further referred to as IR, the Socrates Guidelines for Applicants.

All proposals evaluated and selected under this call for proposals are subject to the general provisions of the FR and its IR. In accordance with these provisions, proposals are evaluated and selected in compliance with the following principles:

- Proposals must meet a number of eligibility and exclusion criteria before further evaluation is possible.
- Mobility Proposals and Full Proposals submitted must meet a number of selection criteria before further evaluation is possible. These criteria enable the beneficiary's financial and operational capacity to carry out the work programme to be assessed and ensure that the beneficiary has sufficient and stable financial sources to continue the activities throughout the project and assure its co-financing
- All proposals must meet a number of award criteria. These criteria facilitate the assessment of the quality of proposals.

Applications – Eligibility

The *Socrates Guidelines for Applicants* contain the eligibility criteria as well as the main selection criteria and priorities of a more permanent nature.[9] They are supplemented by annual Calls for Proposals, and also by specific Calls for Proposals relating to certain Actions within the programme.

Applications - Exclusion Criteria

Following the entry into force of the new Financial Regulation applicable to all Community spending, applicants are subject to the following exclusion criteria. Therefore, when submitting an application candidates shall declare on their honour that

- they have stable and sufficient sources of funding to maintain their activity throughout the period during which the project is being carried out;

- they are not bankrupt or being wound up, are not having their affairs administered by the courts, have not entered into an arrangement with creditors, have not suspended business activities, are not subject of proceedings concerning those matters, and are not in any analogous situation arising from a similar procedure provided for under national legislation or regulations;

- they have the professional competencies and qualifications required to complete the proposed project;

- they have not been guilty of grave professional misconduct proven by any means which the contracting authority can justify;

- they have not been convicted of an offence concerning their professional conduct by a judgement which has the force of *res judicata*;

- they have not been subject of a judgement 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;

- following a procurement procedure or another grant award procedure financed by the Community budget, they have not been declared to be in serious breach of contract for failure to comply with their contractual obligations;

- they have 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.

Applicants who are found guilty of false declarations may receive financial penalties in proportion to the value of the grants in question.

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[9] The term « priorities » used in this text corresponds to the term « award criteria » normally used in calls for proposals. As the *Socrates Guidelines for Applicants* and National Agencies use the term « priorities », the present *Call for Proposals 2006* does so, as well, for reasons of terminological consistency.

Applications- Selection Criteria

Only proposals, which meet all the formal selection criteria (described briefly below**), go forward for further evaluation**.

Beneficiaries have to demonstrate their financial capacity according to Art 176 of the Financial Regulation applicable to the general budget of the European Communities (Council Regulation No 1605/2002 of 25 June 2002). Financial and operational capacity will be assessed on basis of the documents enumerated hereafter which have to be attached to the Application Form for full proposals.

Application Forms for full-proposals under the correct Action must be completed in full and accompanied by the following documents:

- A copy of the profit and loss and the balance sheet of the coordinator for the last 3 financial years for which the accounts have been closed. These documents must be provided in one of the official EU languages. This requirement is waived for public bodies.

- A copy of the legally registered statutes or articles of association as well as a copy of the official registration certificate of the applicant organisation. These documents must be provided in one of the official EU languages.

- Declaration on their honour from applicant organisations, completed and signed, certifying that they exist as a legal person and have the financial and operational capacity to complete the proposed actions.

- CVs of the key persons in the partnership, giving details of relevant professional experience.

- The bank details form completed by the applicant and certified by the bank (original signatures as required). This account or sub-account must make it possible to identify funds paid by the Commission. This account must be held in one of the countries participating in the programme.

- For proposals for which the requested grant amount exceeds € 300,000, the application form must be accompanied by an external audit produced by a certified auditor. This report shall certify the accounts for the last available financial year and give an assessment of the financial viability of the applicant organisation. This requirement is waived for public bodies, secondary and higher education establishments and international organisations (as referred to in art. 43 of the Financial Regulation).

Furthermore, the Commission or the National Agencies may also ask applicant organisations for additional information, at any time.

The Financial Regulation applicable to the general budget of the European Communities (Council Regulation No 1605/2002 of 25 June 2002) and the Implementation Rules (Commission Regulation No 2342/2002 of 23 December 2002) can be consulted at the following web address: : http://europa.eu.int/eur-lex.

Applications - Award Criteria

The European Commission (in the case of so-called centralised Actions) or the National Authority (in the case of so-called decentralised Actions) will award the grants, where applicable after an external evaluation, after having taken into consideration a number of quality criteria referring to the content and the organisational and budgetary aspects of the proposals. These award criteria are set out in detail in the Socrates Guidelines for applicants and in the Specific guides devoted to the different measures covered by this call. The Commission may award a grant of less than the amount requested by the applicant. Grants will not be awarded for more than the amount requested. Each project may give rise to the award of only one grant to any one beneficiary. The award of grants shall be subject to the principle of transparency and equal treatment. The grant may not have the purpose or effect of producing a profit for the beneficiary. Grants may not be cumulative or awarded retrospectively.

A grant may be awarded for a project which has already begun only where the applicant can demonstrate the need to start the project before the agreement is signed. In such cases, expenditure eligible for financing may not have been incurred prior to the date of submission of the grant application. As for the activity period of projects, please refer to Chapter V.

Grant agreements

If the European Commission approves a proposal, a grant agreement in Euro setting out the conditions and the level of funding will be signed by the Commission and the beneficiary. In the case of decentralised Socrates Actions, grant agreements will be signed by the competent National Agency and the beneficiary. Beneficiaries who have been found to have seriously failed to meet their contractual obligations may receive financial penalties.

Payments

Payment shall be made upon proof that the relevant project has been carried out in accordance with the provisions of the grant agreement. The grant amount can be paid through pre-financing, interim payments and payments of the balance. If, under exceptional circumstances, the European Commission or National Agencies pre-finance more than 80% of the project, the Commission or National Agency requires the beneficiary to lodge a bank guarantee in advance, unless the beneficiary is a public-sector body[10].

If the financial capacity of a beneficiary is considered insufficient, the Commission will grant pre-financing payments only if the beneficiary provides a bank guarantee for an amount equivalent to the requested pre-financing.

If the total of pre-financing and interim payments exceeds 750,000 Euro per financial year and per agreement or if a balance payment exceeds 150,000 Euro, an external audit report will be requested from the beneficiary, unless the beneficiary is a public-sector body.

Interim payments and payments of the balance are subject to receipt and approval of interim reports and final reports including a financial statement. In the case of centralised Actions, the beneficiary has to declare any interests yielded by pre-financing, when requesting interim or final payment. In the case of decentralised Socrates Actions, payments are carried out by the competent National Agency.

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[10] Comenius Language Assistants are exempt from this requirement

IV.2. <u>Possible level of grants</u>

The total budget available for the Socrates programme in 2006 amounts to about € 362 million (enlarged EU-25). The *Socrates Guidelines for Applicants* provide information on the financial support available within the programme, where the amount of support provided is likely to remain stable. Generally speaking, the level of grants awarded is likely to vary considerably, depending on the type of project, the number of countries involved and so on.

Centralised actions	Indicative budget (in EUR)	Indicative average grant (in EUR)
COMENIUS 2.1-European cooperation projects for the training of school education staff	**10.900.000**	**230.000 per project**
Comenius 3 - Comenius Networks	**3.900.000**	**415.000 per network**
Erasmus 1 - CD & IP projects	**11.800.000**	**110.000 per CD project** **31.000 per IP project**
Erasmus 3 - Thematic networks	**6.400.000**	**500.000 per network**
Grundtvig 1- European cooperation projects	**15.100.000**	**190.000 per project**
Grundtvig 4 –Networks and thematic seminars	**1.300.000**	**50.000 per seminar** **250.000 per network**
Lingua 1 – Promotion of language learning	**2.600.000**	**100.000 per project/per year**
Lingua 2 – Development of tools and materials	**4.000.000**	**90.000 per project per year**
Minerva – ODL and ICT in Education	**10.200.000**	**285.000 per project**
Accompanying measures	**1.500.000**	**85.000 per project**
Observation and Innovation	**2.400.000**	**200.000 per project**

Decentralised actions	Indicative budget (in EUR)	Indicative average grant (in EUR)
Comenius 1 – school partnerships	**74.400.000**	**5.200 € per school** **14.000 € per school per language project**
Comenius 2.2 – training of teachers and other school education	**19.500.000**	**4.000 € for language assistant grants** **1.500 € for in-service training activities**
Erasmus – Student mobility	**152.200.000**	**140 € per month**
Erasmus – Teaching staff mobility	**15.400.000**	**600 € per grant**
Erasmus – Organisation of Mobility	**23.000.000**	**9.500 € per grant**
Grundtvig 2 – Learning partnerships	**15.600.000**	**8.500 € per partner**
Grundtvig 3 –Individual training grants for staff	**1.600.000**	**1.300 € per grant**
Arion	**2.800.000**	**1.200 € per grant**
Preparatory visits for centralised actions	**2.400.000**	**1.000 € per grant**

V. CLOSING DATES FOR SUBMISSION (= DISPATCH) OF PROPOSALS

Action	Deadline(s)	Activity Period
COMENIUS		
School partnerships	1 February 2006	Start 1 August 2006
Expression of interest to receive a Comenius Language Assistant	1 February 2006	Start 1 August 2006
European co-operation projects for the training of school education staff	1 March 2006	Start 1 October 2006
Individual training grants for school education staff: - grants for initial training - grants for language assistants - grants for in-service training	Contact NA	Contact NA
Comenius Networks	1 November 2005	Start 1 October 2006
ERASMUS		
Erasmus University Charter	1 November 2005	Start 1 July 2006
Curriculum Development projects	1 March 2006	Start 1 October 2006
Intensive Programmes	1 March 2006	Start 1 October 2006
Mobility of students and teaching staff	Contact home university	Contact home university
Thematic networks	1 November 2005	Start 1 October 2006
GRUNDTVIG		
European co-operation projects	1 November 2005	Start 1 October 2006
Learning partnerships	1 March 2006	Start 1 August 2006
Expression of interest to receive a Comenius Language Assistant	1 February 2006	Start 1 August 2006
Individual training grants for adult education staff	Contact NA	Contact NA
Grundtvig Networks and Thematic Seminars	1 November 2005	Start 1 October 2006
LINGUA		
Promotion of language learning	1 November 2005	Start 1 October 2006
Development of tools and materials	1 November 2005	Start 1 October 2006
MINERVA		
Open and distance learning / Information & Communication Technology in education	1 November 2005	Start 1 October 2006
OBSERVATION AND INNOVATION		
General observation activities	Contact Commission	Contact Commission
Arion study visits for education decision-makers	1 June 2006[11]	Start 1 September 2006
Innovatory initiatives responding to emerging needs	Contact Commission	Contact Commission
JOINT ACTIONS	---	---
ACCOMPANYING MEASURES		
Accompanying measures	1 March 2006	Start 1 September 2006
PREPARATORY VISITS		
Preparatory visits for all Actions	Contact NA	Contact NA

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[11] In some countries earlier deadlines apply. Applicants are invited to contact their National Agencies for details.

VI. APPLICATION AND SELECTION PROCEDURES

Application and selection procedures in Socrates vary, depending on whether the Action concerned is managed centrally by the Executive Agency set up by the European Commission or on a decentralised level by the National Agencies designated by participating countries. This information is given in detail in the *Socrates Guidelines for Applicants*.

The application forms to be used, the *Socrates Guidelines for Applicants* and further details on the programme are available:

- from the National Agencies for the programme, the list of which appears in *Socrates Guidelines for Applicants* and at the central website for Socrates below (**decentralised actions**);

- from the central website for Socrates at:
  http://europa.eu.int/comm/education/socrates.html

- from the Executive Agency, Rue Colonel Bourg 139, 1140 Brussels, Tel: +32.2.233.01.11 - Fax: +32.2.233.01.50, fax: (32-2) e-mail: info@socrates-youth.be, which provides the European Commission (Directorate-General for Education and Culture) with technical assistance in implementing the programme (**centralised actions**).

For several of the Actions within the programme, contact seminars are being organised to help people find suitable partner institutions in other participating countries and to establish projects. Details of these events are available from National Agencies on request.

Applicants will be informed of the result of the selection procedures in writing. The Commission and the National Agencies will endeavour to ensure that the selection decisions are made known to applicants at the latest five months after the closing date for submission of project applications. For centralised projects selected in accordance with the two-phase procedure, this will only refer to the second stage of the selection (full project proposals).
Except in the case of grants allocated to individuals, the Commission and the National Agencies will publish the names and addresses of beneficiaries, the grant amount, the financing rate (when applicable) and the object of the grant on the appropriate website.

Michel RICHONNIER