# Erasmus+

## *Programme Guide*

***In the case of conflicting meanings between language versions, the English version prevails.***

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# ABBREVIATIONS

- **DG EAC**: Directorate General for Education, Youth, Sport and Culture
- **EACEA**: Educational, Audiovisual & Culture Executive Agency
- **ECAS:** European Commission Authentication System
- **ECHE:** Erasmus Charter for Higher Education
- **ECTS:** European Credit Transfer and Accumulation System
- **ECVET:** European Credit System for Vocational Education and Training
- **EHEA:** European Higher Education Area
- **EIB:** European Investment Bank
- **ELL:** European Language Label
- **EP**: European Parliament
- **EPALE:** Electronic Platform for Adult Learning in Europe
- **EQAR:** European Quality Assurance Register
- **EQAVET:** European Quality Assurance in Vocational Education and Training
- **EQF:** European Qualifications Framework
- **ESCO:** European Skills, Competences, Qualifications & Occupations
- **EU**: European Union
- **FR**: Financial Regulation
- **HEI:** Higher education institution
- **HERE:** Higher Education Reform Experts
- **ICT:** Information and Communication Technology
- **ISP:** Intensive Study Programme
- **EMJMD:** Erasmus Mundus Joint Master Degree
- **NA**: National Agency
- **NARIC:** National Academic Recognition Information Centre
- **NEO:** National Erasmus+ Office
- **NQF:** National Qualifications Framework
- **OECD:** Organisation of Economic Cooperation and Development
- **OER**: Open Educational Resources
- **OMC**: Open Method of Coordination
- **PIC**: Participant Identification Code
- **URF**: Unique Registration Facility
- **VET:** Vocational Education and Training

# INTRODUCTION

This Programme Guide is a tool for anybody who would like to have a thorough knowledge of what the Erasmus+ Programme is about. This document is mainly addressed to those who wish to be:

- participating organisations: meaning those organisations, institutions, bodies organising activities supported by the Programme;

- participants: meaning those individuals (students, trainees, apprentices, pupils, adult learners, young people, volunteers, or professors, teachers, trainers, youth workers, professionals in the field of education, training, youth and sport, etc.) involved in activities organised by the participating organisations.

Every year, thousands of projects are submitted by organisations across Europe in order to receive financial support from the Erasmus+ Programme; for this reason, the Commission has set up a transparent evaluation process that aims at providing grants for the best projects:

- for most Actions, all the rules and conditions for receiving a grant from the Programme are specified in this Programme Guide;

- for some other Actions, which are only mentioned in this Programme Guide, the rules and conditions for receiving a grant are described in specific calls for proposals published by or on behalf of the European Commission.

When planning an application, potential participating organisations can also be inspired and informed by other reference documents; some of these documents are listed in Annex IV of this Guide.

## HOW TO READ THE PROGRAMME GUIDE

The Programme Guide has three main parts:

- Part A offers a general overview of the Programme. It gives information about the objectives, priorities and main features of the Programme, the Programme Countries, the implementing structures and the overall budget available. This section is addressed to those who wish to have a general overview of the scope and the structure of the Programme.

- Part B provides specific information about the Actions of the Programme that are covered by this Guide. This section is mainly addressed to those who are interested in knowing more in detail which types of projects are supported by the Programme. The information provided in this section is further detailed in Annex I of this Guide.

- Part C gives detailed information on procedures for grant application and selection of projects, as well as the financial and administrative provisions linked to the award of an Erasmus+ grant. This section is addressed to all those who intend to submit a project proposal under the framework of the Erasmus+ Programme.

Furthermore, this Guide includes the following Annexes:

- Annex I: Additional rules and information relating to the Actions covered by the Programme Guide
- Annex II: Dissemination Guidelines for beneficiaries
- Annex III: Glossary of the key terms used in this Guide
- Annex IV: Useful references and contact details

# PART A - GENERAL INFORMATION ABOUT THE ERASMUS+ PROGRAMME

Erasmus+ is the EU Programme in the fields of education, training, youth and sport for the period 2014-2020[1]. Education, training, youth and sport can make a major contribution to help tackle socio-economic changes, the key challenges that Europe will be facing until the end of the decade and to support the implementation of the European policy agenda for growth, jobs, equity and social inclusion.

Fighting high levels of unemployment - particularly among young people - is one of the most urgent tasks for European governments. Too many young people leave school prematurely running a high risk of being unemployed and socially marginalised. The same risk threatens many adults with low skills. Technologies are changing the way in which society operates, and there is a need to ensure the best use is made of them. EU businesses need to become more competitive through talent and innovation.

Europe needs more cohesive and inclusive societies which allow citizens to play an active role in democratic life. Education, training, youth work and sport are key to promote common European values, foster social integration, enhance intercultural understanding and a sense of belonging to a community, and to prevent violent radicalisation. Erasmus+ is an effective instrument to promote the inclusion of people with disadvantaged backgrounds, including newly arrived migrants.

Another challenge relates to the development of social capital among young people, the empowerment of young people and their ability to participate actively in society, in line with the provisions of the Lisbon Treaty to "encourage the participation of young people in democratic life in Europe". This issue can also be targeted through non-formal learning activities, which aim at enhancing the skills and competences of young people as well as their active citizenship. Moreover, there is a need to provide youth organisations and youth workers with training and cooperation opportunities, to develop their professionalism and the European dimension of youth work.

Well-performing education and training systems and youth policies provide people with the skills required by the labour market and the economy, while allowing them to play an active role in society and achieve personal fulfilment. Reforms in education, training and youth can strengthen progress towards these goals, on the basis of a shared vision between policy makers and stakeholders, sound evidence and cooperation across different fields and levels.

The Erasmus+ Programme is designed to support Programme Countries' efforts to efficiently use the potential of Europe's talent and social assets in a lifelong learning perspective, linking support to formal, non-formal and informal learning throughout the education, training and youth fields. The Programme also enhances the opportunities for cooperation and mobility with Partner Countries, notably in the fields of higher education and youth.

In accordance with one of the new elements introduced in the Lisbon Treaty, Erasmus+ also supports activities aiming at developing the European dimension in sport, by promoting cooperation between bodies responsible for sports. The Programme promotes the creation and development of European networks, providing opportunities for cooperation among stakeholders and the exchange and transfer of knowledge and know-how in different areas relating to sport and physical activity. This reinforced cooperation will notably have positive effects in developing the potential of Europe's human capital by helping reduce the social and economic costs of physical inactivity.

The Programme supports actions, cooperation and tools consistent with the objectives of the Europe 2020 Strategy and its flagship initiatives, such as Youth on the Move and the Agenda for new skills and jobs. The Programme also contributes to achieve the objectives of the Education and Training Strategic Framework for European cooperation in Education and Training and of the European Youth Strategy through the Open Methods of Coordination.

This investment in knowledge, skills and competences will benefit individuals, institutions, organisations and society as a whole by contributing to growth and ensuring equity, prosperity and social inclusion in Europe and beyond.

[1] REGULATION (EU) No 1288/2013 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 December 2013 establishing 'Erasmus+': the Union programme for education, training, youth and sport (http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2013:347:0050:0073:EN:PDF)

The Erasmus+ Programme Guide is drafted in accordance with the Erasmus+ annual Work Programme adopted by the European Commission, and therefore may be revised to reflect the priorities and lines of action defined in the Work Programmes adopted in the following years. The implementation of this Guide is also subject to the availability of the appropriations provided for in the draft budget after the adoption of the budget for the year by the Budgetary Authority or as provided for in the system of provisional twelfths.

## BUILDING ON PAST EXPERIENCE, LOOKING TOWARDS THE FUTURE

The Erasmus+ Programme builds on the achievements of more than 25 years of European programmes in the fields of education, training and youth, covering both an intra-European as well as an international cooperation dimension. Erasmus+ is the result of the integration of the following European programmes implemented by the Commission during the period 2007-2013:

- The Lifelong Learning Programme
- The Youth in Action Programme
- The Erasmus Mundus Programme
- Tempus
- Alfa
- Edulink
- Programmes of cooperation with industrialised countries in the field of higher education

These programmes have been supporting Actions in the fields of higher education (including its international dimension), vocational education and training, school education, adult education and youth (including its international dimension).

Erasmus+ aims at going beyond these programmes, by promoting synergies and cross-fertilisation throughout the different fields of education, training and youth, removing artificial boundaries between the various Actions and project formats, fostering new ideas, attracting new actors from the world of work and civil society and stimulating new forms of cooperation.

It is therefore crucial that the Programme is associated with a strong brand name that is widely recognised. For this reason, all the Actions and activities supported under the Programme will have to be communicated first and foremost by using the "Erasmus+" brand name. However, to help participants and beneficiaries of former programmes to find their way into Erasmus+, for the purpose of communication and dissemination, the following names may be used for those Actions targeting a specific sector, in addition to the common "Erasmus+" brand name, as follows:

- "Erasmus+: Comenius", in relation to the activities of the Programme exclusively related to the field of school education;
- "Erasmus+: Erasmus", in relation to the activities of the Programme exclusively related to the field of higher education and targeting Programme Countries;
- "Erasmus+: Erasmus Mundus", in relation to the Erasmus Mundus Joint Masters Degrees;
- "Erasmus+: Leonardo da Vinci", in relation to the activities of the Programme exclusively related to the field of vocational education and training;
- "Erasmus+: Grundtvig", in relation to the activities of the Programme exclusively related to the field of adult learning;
- "Erasmus+: Youth in Action", in relation to the activities of the Programme exclusively related to the field of youth non-formal and informal learning;
- "Erasmus+: Jean Monnet", in relation to the activities of the Programme exclusively associated with the field of European Union studies;
- "Erasmus+: Sports", in relation to the activities of the Programme exclusively related to the field of sport.

# WHAT ARE THE OBJECTIVES AND IMPORTANT FEATURES OF THE ERASMUS+ PROGRAMME?

## GENERAL OBJECTIVE

- The Erasmus+ Programme shall contribute to the achievement of:

  - the objectives of the Europe 2020 Strategy, including the headline education target[2];
  - the objectives of the strategic framework for European cooperation in education and training (ET 2020), including the corresponding benchmarks;
  - the sustainable development of Partner Countries in the field of higher education;
  - the overall objectives of the renewed framework for European cooperation in the youth field (2010-2018);
  - the objective of developing the European dimension in sport, in particular grassroots sport, in line with the EU work plan for sport;
  - the promotion of European values in accordance with Article 2 of the Treaty on the European Union[3].

## IMPORTANT FEATURES OF THE ERASMUS+ PROGRAMME

The following features of the Programme deserve special attention. Some of them are presented in more detail on the Commission website.

### RECOGNITION AND VALIDATION OF SKILLS AND QUALIFICATIONS

Erasmus+ supports EU transparency and recognition tools for skills and qualifications – in particular Europass, Youthpass, the European Qualifications Framework (EQF), the European Credit Transfer and Accumulation System (ECTS), the European Credit System for Vocational Education and Training (ECVET), the European Quality Assurance Reference Framework (EQAVET), the European Quality Assurance Register (EQAR), the European Association for Quality Assurance in Higher Education (ENQA) – as well as EU-wide networks in the field of education and training supporting these tools, in particular the National Academic Recognition Information Centre (NARIC), Euroguidance networks, the National Europass Centres and the EQF National Coordination Points.

A common purpose of these tools is to ensure that skills and qualifications can be more easily recognised and are better understood, within and across national borders, in all sub-systems of education and training as well as in the labour market, no matter whether these were acquired through formal education and training or through other learning experiences (e.g. work experience; volunteering, online learning). The tools also aim to ensure that education, training and youth policies further contribute to achieve the Europe 2020 objectives of smart, sustainable and inclusive growth and its education and employment headline targets through better labour market integration and mobility.

In order to fulfil these objectives, the tools available should be able to cater for new phenomena such as internationalisation of education and growing use of digital learning, and support the creation of flexible learning pathways in line with learners' needs and objectives. The tools may also need to evolve in the future, leading to enhanced coherence and simplification that allow learners and workers to move freely for learning or working.

More information available at: https://ec.europa.eu/education/policy/strategic-framework/skills-qualifications_en

### DISSEMINATION AND EXPLOITATION OF PROJECT RESULTS

Dissemination and exploitation of results are crucial areas of the Erasmus+ project lifecycle. They give participating organisations the opportunity to communicate and share outcomes and deliverables, thus extending the impact of their projects, improving their sustainability and justifying the European added value of Erasmus+. In order to successfully disseminate and exploit project results, organisations involved in Erasmus+ projects are asked to give the necessary thought to dissemination and exploitation activities when designing and implementing their project. The level and intensity of such activities should be proportional to the objectives, the scope and the targets of the different Actions of Erasmus+. Results achieved in a particular project may be highly relevant and interesting also in fields not covered by the project and it is up to

[2] The headline education target is to reduce early school leaving to less than 10% and increase attainment in tertiary education to at least 40% by 2020.
[3] The Union is founded on the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities. These values are common to the Member States in a society in which pluralism, non-discrimination, tolerance, justice, solidarity and equality between women and men prevail.

the individual projects to develop strategies and methods ensuring that others can easily access what has been developed and produced. Specific guidelines in this respect can be found in Annex II to this Programme Guide.

## ERASMUS+ OPEN ACCESS REQUIREMENT FOR EDUCATIONAL MATERIALS

Erasmus+ promotes the open access of project outputs to support learning, teaching, training, and youth work. In particular, Erasmus+ beneficiaries are committed to make any educational resources and tools which are produced in the context of projects supported by the Programme - documents, media, software or other materials freely available for the public under an open license. The materials should be easily accessible and retrievable without cost or limitations, and the open licence must allow the public to use, reuse, adapt and share the resource. Such materials are known as 'Open Educational Resources' (OER). To achieve this aim, the resources should be uploaded in an editable digital form, on a suitable and openly accessible platform. While Erasmus+ encourages beneficiaries to apply the most open licenses,[4] beneficiaries may choose licenses that impose some limitations, e.g. restrict commercial use by others, or commit others to apply the same license on derivative works, if this is appropriate to the nature of the project and to the type of material, and if it still allows the public to use, reuse, adapt and share the resource. The open access requirement is obligatory and is without prejudice to the intellectual property rights of the grant beneficiaries.

## ERASMUS+ OPEN ACCESS FOR RESEARCH AND DATA

Erasmus+ encourages beneficiaries to publish research output through open access pathways, i.e. in ways which are free of cost or other access restrictions. Beneficiaries are also encouraged to apply open licenses to this research output. Whenever possible, data collected by projects should be published as 'open data', i.e. with an open license, in a suitable format and on a suitable open data platform.

## INTERNATIONAL DIMENSION

Erasmus+ includes a strong international dimension (i.e. cooperation with Partner Countries) notably in the fields of higher education and youth.

In the field of higher education, Erasmus+ supports the following main Actions targeting cooperation with Partner Countries:

- **International credit mobility of individuals and Erasmus Mundus Joint Master Degrees** (under Key Action 1) promoting the mobility of learners and staff from and to Partner Countries;
- **Capacity-building** projects in higher education (under Key Action 2) promoting cooperation and partnerships that have an impact on the modernisation and internationalisation of higher education institutions and systems in Partner Countries, with a special focus on Partner Countries neighbouring the EU;
- Support to **policy dialogue** (under Key Action 3) through the network of Higher Education Reform Experts in Partner Countries neighbouring the EU, the international alumni association, policy dialogue with Partner Countries and international attractiveness and promotion events;
- **Jean Monnet** activities with the aim of stimulating teaching, research and reflection in the field of European Union studies worldwide.

In the field of youth, Erasmus+ supports the following main Actions:

- **Mobility for young people and youth workers** (under Key Action 1) promoting Youth Exchanges, volunteering activities and mobility of youth workers in cooperation with Partner Countries neighbouring the EU;
- **Capacity-building** projects in the field of youth (under Key Action 2) promoting cooperation and mobility activities that have a positive impact on the qualitative development of youth work, youth policies and youth systems as well as on the recognition of non-formal education in Partner Countries, notably in African, Caribbean and Pacific (ACP), Asian and Latin American countries;

[4] E.g. the widely used Creative Commons Attribution or Creative Commons Attribution-Share Alike licenses for creative works, the GNU Public License and GNU Lesser Public License for software, or the Open Database License for databases..

- Involvement of young people and youth organisations from Partner Countries neighbouring the EU in the youth **Structured Dialogue** (under Key Action 3) through their participation in international meetings, conferences and events that promote dialogue between young people and decision-makers.

In addition, other Actions of the Programme (Strategic Partnerships, Knowledge Alliances, Sectors Skills Alliances, Collaborative Partnerships) are also open to organisations from Partner Countries in so far as their participation brings an added value to the project (for more information, please consult Part B of this Guide).

## MULTILINGUALISM

Multilingualism is one of the cornerstones of the European project and a powerful symbol of the EU's aspiration to be united in diversity. Foreign languages have a prominent role among the skills that will help equip people better for the labour market and make the most of available opportunities. The EU has set the goal that every citizen should have the opportunity to acquire at least two foreign languages, from an early age.

The promotion of language learning and linguistic diversity is one of the specific objectives of the Programme. The lack of language competences is one of the main barriers to participation in European education, training and youth programmes. The opportunities put in place to offer linguistic support are aimed to make mobility more efficient and effective, to improve learning performance and therefore contribute to the specific objective of the Programme.

Linguistic support is available for the language used by participants for studying, carrying out a traineeship or volunteering abroad in the framework of long-term mobility activities supported under Key Action 1. Linguistic support will mainly be offered via the Erasmus+ Online Linguistic Support, as e-learning offers advantages for language learning in terms of access and flexibility. The Erasmus+ Online Linguistic Support (http://erasmusplusols.eu) includes a mandatory assessment of language competences and voluntary language courses. Language assessment is a crucial aspect of the initiative in order to provide the right preparation for each participant and collect evidence on language skills of EU mobility participants. Therefore, a language assessment will be undertaken by participants before mobility and another assessment will be carried out at the end of the mobility period to monitor progress in language competences. The results of the language assessment test carried out by participants before their departure will not preclude them from taking part in the mobility activity, whatever the result is. The online language assessment shall thus not be used to select Erasmus+ mobility participants, but to provide them with an opportunity to boost their level where needed. The provision of linguistic support shall be based on mutual trust between sending and receiving institutions: it is the responsibility of the sending institution to provide participants with the most appropriate linguistic support, to ensure that they reach the recommended level agreed with the receiving institution by the start of the mobility.

Before the capacity of the online tools can be developed to cover all languages, funding will be provided to beneficiaries of mobility projects with a view to provide linguistic support in the languages not available through the online service offered by the Commission.

Under Key Action 2, Strategic Partnerships in the area of language teaching and learning will be encouraged. Innovation and good practices aiming to promote language skills can include for example teaching and assessment methods, development of pedagogical material, research, computer assisted language learning and entrepreneurial ventures using foreign languages. Furthermore, funding for linguistic support can be provided when necessary to beneficiaries of Strategic Partnerships who organise long-term training and teaching activities for staff, youth workers and learners.

As regards the European Language Label (ELL) awards, National Agencies are encouraged to organise - on a voluntary basis - regular (annual or biennial) national competitions in the Programme Countries. The ELL award should function as a stimulus to exploit and disseminate the results of excellence in multilingualism, and promote public interest in language learning.

Under Key Action 3, and to support Member States' efforts to integrate refugees in Europe's education and training systems, the Erasmus+ Online Linguistic Support (OLS) provided to Erasmus+ participants is extended to the benefit of around 100.000 refugees under the 2016, 2017 and 2018 Calls and until the available budget has been spent , free of charge for them.

The participation of Erasmus+ National Agencies and beneficiary institutions/organisations is fully voluntary. Under this Call, the beneficiaries of the Erasmus+ programme that wish to take part receive a number of additional OLS licences to be allocated specifically to refugees who intend to learn one of the languages available in the OLS. The beneficiary institutions/organisations will be responsible for allocating the licences to the refugees and for reporting on the use of these licences.

## EQUITY AND INCLUSION

The Erasmus+ Programme aims at promoting equity and inclusion by facilitating the access to participants with disadvantaged backgrounds and fewer opportunities compared to their peers whenever disadvantage limits or prevents participation in transnational activities for reasons such as:

- disability (i.e. participants with special needs): people with mental (intellectual, cognitive, learning), physical, sensory or other disabilities;
- educational difficulties: young people with learning difficulties; early school-leavers; low qualified adults; young people with poor school performance;
- economic obstacles: people with a low standard of living, low income, dependence on social welfare system or homeless; young people in long-term unemployment or poverty; people in debt or with financial problems;
- cultural differences: immigrants or refugees or descendants from immigrant or refugee families; people belonging to a national or ethnic minority; people with linguistic adaptation and cultural inclusion difficulties;
- health problems: people with chronic health problems, severe illnesses or psychiatric conditions;
- social obstacles: people facing discrimination because of gender, age, ethnicity, religion, sexual orientation, disability, etc.; people with limited social skills or anti-social or risky behaviours; people in a precarious situation; (ex-)offenders, (ex-)drug or alcohol abusers; young and/or single parents; orphans;
- geographical obstacles: people from remote or rural areas; people living in small islands or in peripheral regions; people from urban problem zones; people from less serviced areas (limited public transport, poor facilities).

In the field of youth, an Inclusion and Diversity Strategy has been designed as a common framework to support the participation and inclusion of young people with fewer opportunities in Erasmus+. The Strategy is available on the website[5] of the European Commission.

## PROTECTION AND SAFETY OF PARTICIPANTS

Protection and safety of participants involved in the Erasmus+ projects are important principles of the Programme. All persons participating in the Erasmus+ Programme should have the opportunity to take full advantage of the possibilities for personal and professional development and learning. This should be assured in a safe environment which respects and protects the rights of all persons.

To this end each organisation participating in the Erasmus+ Programme must have in place effective procedures and arrangements to promote and guarantee the safety and protection of the participants in their activity. With this regard, all students, trainees, apprentices, pupils, adult learners, young people, staff and volunteers, involved in a mobility activity under all Key Actions of the Erasmus+ Programme, must be insured against the risks linked to their participation in these activities. Apart from the volunteering activities which foresee a specific insurance policy (see Annex I of this Guide), the Erasmus+ Programme does not define a unique format of insurance, nor does it recommend specific insurance companies. The Programme leaves it up to project organisers to seek the most suitable insurance policy according to the type of project carried out and to the insurance formats available at national level. Furthermore, it is not necessary to subscribe to a project-specific insurance, if the participants are already covered by existing insurance policies of the project organisers.

In either case, the following areas must be covered:

- wherever relevant, travel insurance (including damage or loss of luggage);
- third party liability (including, wherever appropriate, professional indemnity or insurance for responsibility);
- accident and serious illness (including permanent or temporary incapacity);
- death (including repatriation in case of projects carried out abroad).

If applicable, it is strongly recommended that participants in transnational activities are in possession of a European Health Insurance Card. This is a free card that gives access to medically necessary, state-provided healthcare during a temporary stay in any of the 28 EU countries, Iceland, Liechtenstein and Norway, under the same conditions and at the same cost (free in some countries) as people insured in that country. More information on the card and on how to obtain it is available at http://ec.europa.eu/social/main.jsp?catId=559.

Finally, if projects involve young people under 18, participating organisations are required to obtain the prior authorisation of participation from their parents or those acting on their behalf.

[5] The Erasmus+ Inclusion and Diversity Strategy in the field of youth: http://ec.europa.eu/youth/library/reports/inclusion-diversity-strategy_en.pdf

# WHAT IS THE STRUCTURE OF THE ERASMUS+ PROGRAMME?

In order to achieve its objectives, the Erasmus+ Programme implements the following Actions:

## KEY ACTION 1 – MOBILITY OF INDIVIDUALS

This Key Action supports:

- **Mobility of learners and staff:** opportunities for students, trainees, young people and volunteers, as well as for professors, teachers, trainers, youth workers, staff of education institutions and civil society organisations to undertake a learning and/or professional experience in another country;

- **Erasmus Mundus Joint Master Degrees:** high-level integrated international study programmes delivered by consortia of higher education institutions that award full degree scholarships to the best master students worldwide;

- **Erasmus+ Master Loans:** higher education students from Programme Countries can apply for a loan backed up by the Programme to go abroad for a full Master Degree. Students should address themselves to national banks or student loan agencies participating in the scheme.

## KEY ACTION 2 – COOPERATION FOR INNOVATION AND THE EXCHANGE OF GOOD PRACTICES

This Key Action supports:

- Transnational **Strategic Partnerships** aimed to develop initiatives addressing one or more fields of education training and youth and promote innovation, exchange of experience and know-how between different types of organisations involved in education, training and youth or in other relevant fields. Certain mobility activities are supported in so far as they contribute to the objectives of the project;

- **Knowledge Alliances** between higher education institutions and enterprises which aim to foster innovation, entrepreneurship, creativity, employability, knowledge exchange and/or multidisciplinary teaching and learning;

- **Sector Skills Alliances** supporting the design and delivery of joint vocational training curricula, programmes and teaching and training methodologies, drawing on evidence of trends in a specific economic sector and skills needed in order to perform in one or more professional fields;

- **Capacity-building** projects supporting cooperation with Partner Countries in the fields of higher education and youth. Capacity-building projects aim to support organisations/institutions and systems in their modernisation and internationalisation process. Certain types of capacity-building projects support mobility activities in so far as they contribute to the objectives of the project;

- IT support platforms, such as **eTwinning,** the **School Education Gateway,** the **European Platform for Adult Learning (EPALE)** and the **European Youth Portal**, offering virtual collaboration spaces, databases of opportunities, communities of practice and other online services for teachers, trainers and practitioners in the field of school and adult education as well as for young people, volunteers and youth workers across Europe and beyond.

## KEY ACTION 3 – SUPPORT FOR POLICY REFORM

This Key Action supports:

- **Knowledge in the fields of education, training and youth** for evidence-based policy making and monitoring, in particular:
  - country-specific and thematic analysis, including through cooperation with academic networks;
  - peer learning and peer reviews through the Open Methods of Coordination in education, training and youth.

- **Initiatives for policy innovation** to stimulate innovative policy development among stakeholders and to enable public authorities to test the effectiveness of innovative policies through field trials based on sound evaluation methodologies;

- **Support to European policy tools** to facilitate transparency and recognition of skills and qualifications, as well as the transfer of credits, to foster quality assurance, support validation of non-formal and informal learning, skills

management and guidance. This Action also includes the support to networks that facilitate cross-European exchanges, the learning and working mobility of citizens as well as the development of flexible learning pathways between different fields of education, training and youth;

- **Cooperation with international organisations** with highly recognised expertise and analytical capacity (such as the OECD and the Council of Europe), to strengthen the impact and added value of policies in the fields of education, training and youth;

- **Stakeholder dialogue, policy and Programme promotion** involving public authorities, providers and stakeholders in the fields of education, training and youth for raising awareness about the European policy agendas, in particular Europe 2020, Education and Training 2020, the European Youth Strategy, as well as the external dimension of European education, training and youth policies. These activities are essential to develop the capacity of stakeholders to actively support the implementation of policies by stimulating the exploitation of the Programme results and generating tangible impact.

## JEAN MONNET ACTIVITIES

The Jean Monnet Activities will support:

- **Academic Modules, Chairs, Centres of Excellence** in order to deepen teaching in European integration studies embodied in an official curriculum of a higher education institution, as well as to conduct, monitor and supervise research on EU content, also for other educational levels such as teacher training and compulsory education. These Actions are also intended to provide in-depth teaching on European integration matters for future professionals in fields which are in increasing demand on the labour market, and at the same time aim at encouraging, advising and mentoring the young generation of teachers and researchers in European integration subject areas;

- **Policy debate with academic world,** supported through: a) **Networks** to enhance cooperation between different universities throughout Europe and around the world, foster cooperation and create a high knowledge exchange platform with public actors and the Commission services on highly relevant EU subjects; b) **Projects** for innovation and cross-fertilisation and spread of EU content aimed to promote discussion, reflection on EU issues and to enhance knowledge about the EU and its processes;

- **Support to associations,** to organise and carry out statutory activities of associations dealing with EU studies and EU issues, and to publicize EU facts among a wider public enhancing active European citizenship.

The Jean Monnet Activities also provide operating grants to **designated institutions** which pursue an aim of European interest and organises **Studies and conferences** with the purpose of providing policy-makers with new insights and concrete suggestions.

## SPORT

Actions in the field of sport will support:

- **Collaborative Partnerships**, aimed at promoting the integrity of Sport (anti-doping, fight against match fixing, protection of minors), supporting innovative approaches to implement EU principles on good governance in sport, EU strategies in the area of social inclusion and equal opportunities, encouraging participation in sport and physical activity (supporting the implementation of EU Physical Activity Guidelines, volunteering, employment in sport as well as education and training in sport), and supporting the implementation of the EU guidelines on dual careers of athletes. These partnerships include also Small Collaborative Partnerships, aimed at encouraging social inclusion and equal opportunities in sport, promoting European traditional sports and games, supporting the mobility of volunteers, coaches, managers and staff of non-profit sport organisations and protecting athletes, especially the youngest, from health and safety hazards by improving training and competition conditions.

- **Not-for-profit European sport events**, granting individual organisations in charge of the preparation, organisation and follow-up to a given event. The activities involved will include the organisation of training activities for athletes and volunteers in the run-up to the event, opening and closing ceremonies, competitions, side-activities to the sporting event (conferences, seminars), as well as the implementation of legacy activities, such as evaluations or follow-up activities;

- **Strengthening of the evidence base for policy making** through studies; data gathering, surveys; networks; conferences and seminars which spread good practices from Programme Countries and sport organisations and

reinforce networks at EU level so that national members of those networks benefit from synergies and exchanges with their partners;

- **Dialogue with relevant European stakeholders**, being mainly the annual EU Sport Forum and support to Sport Presidency events organised by the EU Member States holding the Presidency of the EU. Other ad hoc meetings and seminars relevant to ensure optimal dialogue with the sport stakeholders may also be organised as appropriate.

## WHAT IS THE BUDGET?

The Programme has an overall indicative financial envelope of 14.774 billion EUR under Heading 1 and of 1.680 billion EUR under Heading 4 of the EU Budget for the seven years (2014-2020). The annual budget is adopted by the Budgetary Authority. The different steps for the adoption of the EU budget can be followed at:
http://ec.europa.eu/budget/explained/management/deciding/deciding_detail/decide_detail_en.cfm

For information about the available budget by action, planned number of projects to be granted as well as indicative average grants, please consult the 2018 [6] Erasmus+ Annual Work Programme (http://ec.europa.eu/dgs/education_culture/more_info/awp/index_en.htm)

[6] Actions in the field of higher education targeting mobility and cooperation with Partner Countries are also supported with Heading 4 funds allocated by the 2017 Annual Work Programme (http://ec.europa.eu/dgs/education_culture/more_info/awp/index_en.htm)

# WHO IMPLEMENTS THE ERASMUS+ PROGRAMME?

## THE EUROPEAN COMMISSION

The European Commission is ultimately responsible for the running of the Erasmus+ Programme. It manages the budget and sets priorities, targets and criteria for the Programme on an on-going basis. Furthermore, it guides and monitors the general implementation, follow-up and evaluation of the Programme at European level. The European Commission also bears the overall responsibility for the supervision and coordination of the structures in charge of implementing the Programme at national level.

At European level, the European Commission's Education, Audiovisual and Culture Executive Agency (Executive Agency) is responsible for the implementation of the centralised Actions of the Erasmus+ Programme. The Executive Agency is in charge of the complete life-cycle management of these projects, from the promotion of the Programme, the analysis of the grant requests, the monitoring of projects on the spot, up to the dissemination of the project and Programme results. It is also responsible for launching specific calls for proposals relating to some Actions of the Programme which are not covered through this Guide.

The European Commission, notably through the Executive Agency, is also responsible for:

- carrying out studies in the fields supported by the Programme;
- carrying out research and evidence-based activities through the Eurydice network;
- improving the visibility and the systemic impact of the Programme through dissemination and exploitation activities of the Programme's results;
- ensuring the contractual management and financing of bodies and networks supported by the Erasmus+ Programme;
- managing calls for tenders to provide services within the framework of the Programme.

## THE NATIONAL AGENCIES

The implementation of the Erasmus+ Programme is mainly implemented as Indirect Management, meaning that the European Commission entrusts budget implementation tasks to National Agencies; the rationale of this approach is to bring Erasmus+ as close as possible to its beneficiaries and to adapt to the diversity of national education, training and youth systems. For this purpose, each Programme Country has appointed one or more National Agencies (for the contact details, please consult Annex IV of this Guide). These National Agencies promote and implement the Programme at national level and act as the link between the European Commission and participating organisations at local, regional and national level. It is their task to:

- provide appropriate information on the Erasmus+ Programme;
- administer a fair and transparent selection process for project applications to be funded in their country;
- monitor and evaluate the implementation of the Programme in their country;
- provide support to project applicants and participating organisations throughout the project life-cycle;
- collaborate effectively with the network of all National Agencies and the European Commission;
- ensure the visibility of the Programme;
- promote the dissemination and exploitation of the results of the Programme at local and national level.

In addition, National Agencies play an important role as intermediate structures for the qualitative development of the Erasmus+ Programme by:

- carrying out activities - outside the tasks of project life-cycle management - that support the qualitative implementation of the Programme and/or trigger policy developments in the fields supported by the Programme;
- providing a supportive approach to newcomers and less advantaged target groups in order to remove the obstacles to full participation in the Programme;
- seeking cooperation with external bodies in order to increase the impact of the Programme in their country.

The supportive approach of National Agencies aims at guiding the users of the Programme through all phases, from the first contact with the Programme through the application process to the realisation of the project and the final evaluation. This principle is not in contradiction with the fairness and the transparency of selection procedures. Rather, it is based on the idea that in order to guarantee equal opportunities for everybody, it is necessary to give more assistance to some Programme target groups through advising, counselling, monitoring, and coaching systems tailored to their needs.

## WHAT OTHER BODIES ARE INVOLVED IN THE IMPLEMENTATION OF THE PROGRAMME?

Apart from the bodies mentioned above, the following structures provide complementary expertise to the implementation of the Erasmus+ Programme:

### EURYDICE NETWORK

The Eurydice network primarily focuses on the way education in Europe is structured and organised at all levels and aims at contributing towards a better mutual understanding of systems in Europe. It provides those responsible for education systems and policies in Europe with European-level comparative analyses and national specific information in the fields of education and youth, which will assist them in their decision-making.

The Eurydice Network produces a vast source of information, including detailed descriptions and overviews of national education systems (National Education systems and Policies), comparative thematic reports devoted to specific topics of Community interest (Thematic Reports), indicators and statistics (Key Data Series), and a series of facts and figures related to education, such as national education structures, school calendars, comparison of teacher salaries and of required taught time for countries and education levels (Facts and Figures).

It consists of a central coordinating unit located at the Executive Agency and national units based in all Erasmus+ Programme Countries plus Albania, Bosnia and Herzegovina, Montenegro and Serbia.

More information is available on the website of the Executive Agency.

### YOUTH WIKI NATIONAL CORRESPONDENTS NETWORK

In line with the EU Youth Strategy and the objective of improving the knowledge on youth issues in Europe, financial support is provided to National Structures contributing to the creation and maintenance of the Youth Wiki, an interactive tool providing information on the situation of young people in Europe and on national youth policies in a coherent, updated and exploitable way.

Financial support is given to the bodies designated by the national authorities, located in a Programme Country, for actions carried out by these bodies for the production of country specific information, comparable country descriptions and indicators which contribute towards a better mutual understanding of youth systems and policies in Europe.

### ETWINNING SUPPORT SERVICES

eTwinning is a community of teachers from pre-primary to upper secondary schools, hosted on a secure platform accessible only to teachers vetted by national authorities. Participants can involve themselves in many activities: carrying out projects with other schools and classrooms; discussions with colleagues and development of professional networking; involvement in a variety of professional development opportunities (online and face-to-face); etc. eTwinning is funded under Key Action 2 of the Erasmus+ Programme. Since its launch in 2005, more than 380.000 teachers in over 160.000 schools have registered and nearly 50.000 projects have taken place in the programme countries.

Teachers and schools participating in eTwinning receive support from their National Support Services (NSS). These are organisations appointed by the competent national authorities. They assist schools during the process of registration, partner finding and project activity, promote the Action, deliver prizes and quality labels and organise professional development activities for teachers.

The National Support Services are coordinated by a Central Support Service (CSS), which is also responsible for the development of the eTwinning Internet platform and the organisation of teacher professional development activities at European level.

The list of all services and more information available at:
http://www.etwinning.net/en/pub/get_support/contact.htm

### THE SCHOOL EDUCATION GATEWAY (SEG)

The School Education Gateway is Europe's online platform for school education, currently available in 23 EU languages, intended to provide everything that teachers need in terms of information, learning and professional development, peer support and networking, collaborative project and mobility opportunities, policy insights etc. Apart from the teacher

community, the target user base of the SEG includes all parties participating in activities under the Erasmus+ Programme such as: schools and other educational actors and organizations; policy makers and national authorities; NGOs; enterprises; etc. As it is a public website, it can be accesed by anyone on Internet (i.e. also from countries outside the EU). This wide reach is expected to improve the links between policy and practice in European school education, as well as help promote policy based on the reality of what is happening at schools and what is needed by the job market.

The SEG offers a wide range of content, such as good practices from European projects; monthly blog contributions and video interviews of European school education experts; online courses for teachers to help tackle topical classroom challenges; resources such as teaching materials, tutorials and the European Toolkit for Schools; information on school education policies; topical news and events; etc. It offers special tools to support teachers and school staff in finding training and mobility opportunities for professional development (on-site courses, job shadowing, teaching assignments etc), which can be funded under Erasmus+ Key Action 1:

- Erasmus+ tool "Course Catalogue" (for face-to-face training opportunities);
- Erasmus+ tool "Mobility Opportunities" (for teacher mobility under KA1);

http://schooleducationgateway.eu

## EPALE

The Electronic Platform for Adult Learning in Europe - known as EPALE - is an initiative of the European Commission funded by the Erasmus+ programme. It is open to teachers, trainers and volunteers, as well as policy-makers, researchers, media and academics involved in adult learning.

The site offers interactive networks, enabling users to link with others all around Europe, engage in discussions and exchange good practice. Amongst many tools and content, EPALE offers instruments of specific interest for Erasmus+ (potential) beneficiaries. Some examples include:

- A Calendar of courses and events, which can be used
  - to find mobility opportunities to beneficiaries of KA1 projects
  - to promote courses and events organised by KA2 projects
- A Partner-search tool, useful to find partners to prepare an EU-funded project or to find or offer a job-shadowing opportunity.
- Communities of practice offer an additional facility to liaise with people and organisations with similar interest
- Collaborative spaces, where project partners can work in a safe environment to develop their project
- A Resource centre, where project beneficiaries can reference articles, reports, manuals, and any other material produced by their project or their organisation, hence offering an additional dissemination opportunity
- A Blog, where participants in projects can share their experience or upload videos presenting their results in an in-formal and dynamic way.

Projects that receive EU funding are encouraged to share information on their activities and results on the platform through blog posts, news, events and other kinds of activities.

EPALE is implemented by a Central Support Service and a network of National Support Services in Erasmus+ Programme countries, which are in charge of identifying interesting information and encourage stakeholders to use and contribute to the platform. EPALE can be accessed at: http://ec.europa.eu/epale.

## NATIONAL ERASMUS+ OFFICES

In the Partner Countries concerned (Western Balkans, Eastern and Southern Mediterranean countries, Russia and Central Asia) the National Erasmus+ Offices (NEOs) assist the Commission, the Executive Agency and the local authorities in the implementation of the Erasmus+ Programme. They are the focal point in these countries for their stakeholders involved in the Erasmus+ Programme in the area of higher education. They contribute to improving awareness, visibility, relevance, effectiveness and impact of the international dimension of Erasmus+.

The National Erasmus+ Offices are responsible for:

- providing information about Erasmus+ activities that are open to the participation of their countries in the field of higher education;

- advising and assisting potential applicants;
- monitoring Erasmus+ projects;
- coordinating the local team of Higher Education Reform Experts (HEREs);
- monitoring the legacy of the Tempus IV Programme (2007-2013);
- contributing to studies and events;
- providing support to policy dialogue;
- maintaining contacts with the local authorities and EU delegations;
- following policy developments in the field of higher education in their country.

### ACP Secretariat

In the Partner Countries concerned (ACP countries), implementation of certain actions will be done in close cooperation with the Committee of Ambassadors of the Group of African, Caribbean and Pacific States represented by the ACP Secretariat which is involved in the programming and implementation of these actions.

### Network of Higher Education Reform Experts (HEREs)

In the Partner Countries concerned (Western Balkans, Eastern and Southern Mediterranean countries, Russia and Central Asia), the National Teams of Higher Education Reform Experts provide a pool of expertise to local authorities and stakeholders to promote reform and enhance progress in higher education. They participate in the development of policies in higher education in their respective country. HERE activities are based on "peer to peer" contacts. Each national team consist of five to fifteen members. The HEREs are experts in the field of higher education (Rectors, Vice-Rectors, Deans, senior academics, international relations officers, students etc.).

The mission of the HEREs involves supporting:

- policy development in their respective countries, by supporting modernisation, reform processes and strategies in higher education, in close contact with the local authorities concerned;
- policy dialogue with the EU in the field of higher education;
- training and counselling activities targeted at local stakeholders, in particular higher education institutions and their staff;
  Erasmus+ projects (in particular those implemented under the Capacity-building Action) by disseminating their results and outcomes, notably good practices and innovative initiatives and exploiting these for training purposes.

### Euroguidance network

Euroguidance is a European network of national resource and information centres. All Euroguidance centres share two common goals:

- to promote the European dimension in guidance for education and vocational training;
- to provide quality information on lifelong guidance and mobility for learning purposes.

The main target group of Euroguidance is guidance practitioners and policy makers from both the educational and employment sectors in all European countries.
More information available at: http://euroguidance.eu/.

### Europass National Centres

Europass aims to help individuals to present and document their skills and qualifications in a clear and transparent way throughout Europe. Communication between job-seekers and employers, as well as mobility for working or learning purposes, are facilitated by this initiative.

In every country (European Union and European Economic Area plus the former Yugoslav Republic of Macedonia and Turkey), a National Europass Centre coordinates all activities related to the Europass documents. It is the first point of contact for any person or organisation interested in using or learning more about Europass.

More information available at: http://europass.cedefop.europa.eu/en/about/national-europass-centres

## EUROPEAN QUALIFICATIONS FRAMEWORK (EQF) NATIONAL COORDINATION POINTS (NCP)

The EQF NCPs support national authorities in establishing national qualifications frameworks. The activities of the EQF NCPs are geared towards the following:

- Referencing of national qualifications systems to the European reference levels;
- Referencing to the appropriate EQF level on qualifications certificates, diplomas and Europass documents issued by the competent authorities.

More information available at: http://ec.europa.eu/ploteus

## NETWORK OF EQAVET NATIONAL REFERENCE POINTS

The EQAVET National Reference Points (NRPs) are established by national authorities and bring together existing relevant bodies involving the social partners and all stakeholders concerned at national and regional levels, to contribute to the implementation of the European framework for quality assurance in VET. The EQAVET NRPs aim to 1) provide active support for the implementation of the EQAVET work programme, 2) take concrete initiatives to promote further development of the EQAVET framework in the national context, 3) support self-evaluation as a complementary and effective means of quality assurance allowing the measurement of success and the identification of areas for improvement and 4) ensure that information is disseminated to stakeholders effectively.

More information available at: http://www.eqavet.eu/

## NATIONAL ACADEMIC RECOGNITION INFORMATION CENTRES (NARIC)

The NARIC network provides information concerning the recognition of diplomas and periods of study undertaken in other European countries as well as advice on foreign academic diplomas in the country where the NARIC is established. The NARIC network provides authoritative advice to anyone travelling abroad for the purposes of work or further education, but also to institutions, students, advisers, parents, teachers and prospective employers.

The European Commission supports the activities of the NARIC network through the exchange of information and experience between countries, the identification of good practices, the comparative analysis of systems and policies in this field, and the discussion and analysis of matters of common educational policy interest.

More information available at: www.enic-naric.net

## NETWORK OF NATIONAL TEAMS OF ECVET EXPERTS

The National Teams of ECVET Experts provide a pool of expertise to support the implementation of a European Credit System for Vocational Education and Training (ECVET). They promote the adoption, the application and the use of ECVET in the Programme Countries and provide counselling to VET relevant competent bodies and institutions.

More information available at: http://www.ecvet-secretariat.eu and
http://ec.europa.eu/education/policy/vocational-policy/ecvet_en.htm

## SALTO YOUTH RESOURCE CENTRES

The aim of the SALTO Youth Resource Centres is to help improve the quality of Erasmus+ projects in the field of youth. Through their thematic (participation, information, inclusion, diversity, training and recognition) or geographical (Eastern Partnership Countries and Russia, Southern Mediterranean, Western Balkans) focus, they provide resources, information and training in specific areas for National Agencies and other actors involved in youth work, and foster the recognition of non-formal and informal learning.

Their work involves:

- organising training courses, study visits, forums and partnership-building activities;
- developing and documenting training and youth work methods and tools;
- giving an overview of European training activities that are available to youth workers through the European Training Calendar;
- issuing practical publications;

- providing up-to-date information about European youth work and the different priorities;
- providing a database of trainers and resource persons in the field of youth work and training;
- coordinating the implementation of Youthpass;
- carrying out the accreditation of Erasmus+ Volunteering organisations in Partner Countries neighbouring the EU.

More information available at: www.salto-youth.net.

**Otlas – the partner finding tool**

One of the tools developed and hosted by the SALTO-Youth Resource Centres is Otlas, a central online partner finding tool for organisations in the youth field. Organisations can register their contact details and areas of interest in Otlas, and also create partner requests for project ideas.

More information available at: www.salto-youth.net/otlas or www.otlas.eu.

## EURODESK NETWORK

The Eurodesk network offers information services to young people and those who work with them on European opportunities in the education, training and youth fields, and the involvement of young people in European activities.

Present in all Programme Countries, and coordinated at European level by the Eurodesk Brussels-link Office, the Eurodesk network offers enquiry answering services, funding information, events and publications. It also contributes to the animation of the European Youth Portal.

The European Youth Portal offers European and national information and opportunities that are of interest to young people who are living, learning and working in Europe. It gives information around eight main themes, covers 33 countries and is available in 27 languages.

To access the European Youth Portal, go to: http://europa.eu/youth/splash_en. For more information on Eurodesk, go to: http://www.eurodesk.org/edesk/.

# WHO CAN PARTICIPATE IN THE ERASMUS+ PROGRAMME?

Individuals - students, trainees, apprentices, pupils, adult learners, young people, volunteers, professors, teachers, trainers, youth workers, professionals of organisations active in the fields of education, training and youth constitute the main target population of the Programme. However, the Programme reaches these individuals through organisations, institutions, bodies or groups that organise such activities. The conditions of access to the Programme therefore relate to these two actors: the "participants" (individuals participating in the Programme) and the "participating organisations" (including groups of at least four young people active in youth work but not necessarily in the context of youth organisations, also referred to as informal groups of young people). For both participants and participating organisations, the conditions for participation depend on the country in which they are based.

## PARTICIPANTS

As a general rule, participants in Erasmus+ projects must be established in a Programme Country. Some Actions, notably in the fields of higher education and youth, are also open to participants from Partner Countries.

The specific conditions for participating in an Erasmus+ project depend on the type of Action concerned.

In general terms:

- For projects relevant for the field of higher education, the main targets are: higher education students (short cycle, first, second or third cycle), higher education teachers and professors, staff of higher education institutions, trainers and professionals in enterprises;
- For projects relevant for the field of vocational education and training, the main targets are: apprentices and students in vocational education, professionals and trainers in vocational training, staff of initial vocational education organisations, trainers and professionals in enterprises;
- For projects relevant for the field of school education, the main targets are: school leaders, school teachers and school staff, pupils in pre-primary, primary and secondary education;
- For projects relevant for the field of adult education, the main targets are: members of non-vocational adult education organisations, trainers, staff and learners in non-vocational adult education;
- For projects relevant for the youth field the main targets are: young people from 13 to 30[7], youth workers, staff and members of organisations active in the youth field;
- For projects relevant to the field of sport, the main targets are: professionals and volunteers in the field of sport, athletes and coaches.

For more details on the conditions for participation in each specific Action, please consult Part B and Annex I of this Guide.

## PARTICIPATING ORGANISATIONS

Erasmus+ projects are submitted and managed by participating organisations representing the participants. If a project is selected, the applicant organisation becomes a beneficiary of an Erasmus+ grant. Beneficiaries sign a grant agreement or are notified of a grant decision which entitles them to receive financial support for the realisation of their project (grant agreements are not signed with individual participants). Some Actions of the Programme are also open to informal groups of young people.

As a general rule, organisations participating in Erasmus+ projects must be established in a Programme Country. Some Actions are also open to participating organisations from Partner Countries, notably in the field of higher education and youth.

The specific conditions for participating in an Erasmus+ project depend on the type of Action supported by the Programme. In general terms, the Programme is open to any organisation active in the fields of education, training, youth or sport. Several Actions are also open to the participation of other players in the labour market.

For more details, please consult Part B and Annex I of this Guide.

[7] Different age limits apply depending on the different types of activities. For more information please consult Part B and Annex I of this Guide. Please also consider the following:
lower age limits - participants must have reached the minimum age at the start date of the activity.
upper age limits - participants must not be older than the indicated maximum age at the application deadline.

# ELIGIBLE COUNTRIES

The Erasmus+ Programme is open to the following countries:

## PROGRAMME COUNTRIES

The following countries can fully take part in all the Actions of the Erasmus+ Programme:

| Member States of the European Union (EU)[8] | | | |
|---|---|---|---|
| Belgium | Greece | Lithuania | Portugal |
| Bulgaria | Spain | Luxembourg | Romania |
| Czech Republic | France | Hungary | Slovenia |
| Denmark | Croatia | Malta | Slovakia |
| Germany | Italy | Netherlands | Finland |
| Estonia | Cyprus | Austria | Sweden |
| Ireland | Latvia | Poland | United Kingdom |

| Non EU Programme Countries | | |
|---|---|---|
| former Yugoslav Republic of Macedonia | Iceland | Norway |
| | Liechtenstein | Turkey |

## PARTNER COUNTRIES

The following countries can take part in certain Actions of the Programme, subject to specific criteria or conditions (for more information, please consult Part B of this Guide). Funding will be allocated to organisations in the countries within their territories as recognised by international law. Applicants and participants must respect any restrictions placed on EU external assistance imposed by the European Council. Applications have to be in line with the overall EU values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities as foreseen in art 2 of the Treaty of the European Union.

[8] According to Article 33.3 of the Council Decision 2013/755/EU* on the Association of the OCTs with the European Union adopted on 25 November 2013 (http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2013:344:0001:0118:EN:PDF), the Union shall ensure that individuals and organisations from or to Overseas Countries and Territories (OCT) shall be eligible for the Erasmus+, subject to the rules of the Programme and the arrangements applicable to the Member State with which these OCTs they are connected. This means that individuals and organisations from the OCTs are participating in the programme on a 'Programme country' status, the 'Programme country' being the Member State with which they are connected. The list of OCTs can be found at: https://ec.europa.eu/europeaid/regions/overseas-countries-and-territories-octs/eu-oct-dialogue_en

## PARTNER COUNTRIES NEIGHBOURING THE EU[9]

| Western Balkans (Region 1) | Eastern Partnership countries (Region 2) | South-Mediterranean countries (Region 3) | Russian Federation (Region 4) |
|---|---|---|---|
| Albania<br>Bosnia and Herzegovina<br>Kosovo[10]<br>Montenegro<br>Serbia | Armenia<br>Azerbaijan<br>Belarus<br>Georgia<br>Moldova<br>Territory of Ukraine as recognised by international law | Algeria<br>Egypt<br>Israel<br>Jordan<br>Lebanon<br>Libya<br>Morocco<br>Palestine[11]<br>Syria<br>Tunisia | Territory of Russia as recognised by international law |

## OTHER PARTNER COUNTRIES

Some Actions of the Programme are open to any Partner Country of the world listed below. For some other Actions the geographical scope is less broad.

The Partner Countries below are regrouped according to the financial instruments of the EU external action.

| | |
|---|---|
| **Region 5** | Andorra, Monaco, San Marino, Vatican City State, |
| **Region 6[12] Asia** | Afghanistan, Bangladesh, Bhutan, Cambodia, China, DPR Korea, India, Indonesia, Laos, Malaysia, Maldives, Mongolia, Myanmar, Nepal, Pakistan, Philippines, Sri Lanka, Thailand and Vietnam |
| **Region 7[13] Central Asia** | Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan |
| **Region 8[14] Latin America** | Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, Venezuela |
| **Region 9[15]** | Iran, Iraq, Yemen |
| **Region 10[16]** | South Africa |
| **Region 11 ACP** | Angola, Antigua and Barbuda, Bahamas, Barbados, Belize, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Congo - Democratic Republic of the, Cook Islands, Djibouti, Dominica, Dominican Republic, Equatorial Guinea, Eritrea, Ethiopia, Fiji, Gabon, Gambia, Ghana, Grenada, Guinea, Guinea-Bissau, Guyana, Haiti, Republic of Côte d'Ivoire, Jamaica, Kenya, Kiribati, Lesotho, Liberia, Madagascar, Malawi, Mali, Marshall Islands, Mauritania, Mauritius, Micronesia- Federated States of, Mozambique, Namibia, Nauru, Niger, Nigeria, Niue, Palau, Papua New Guinea, Rwanda, Saint Kitts And Nevis, Saint Lucia, Saint Vincent And The Grenadines, Samoa, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Solomon Islands, Somalia, South Sudan, Sudan, Suriname, Swaziland, Timor Leste - Democratic Republic of, Tanzania, Togo, Tonga, Trinidad and Tobago, Tuvalu, Uganda, Vanuatu, Zambia, Zimbabwe. |
| **Region 12[17] Industrialised: Gulf Cooperation countries** | Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates. |

[9] The eligibility criteria formulated in commission notice Nr.2013/C-205/05 (OJEU C-205 of 19/07/2013, pp. 9-11) shall apply for all actions implemented through this Programme Guide, including with respect to third parties receiving financial support in the cases where the respective action involves financial support to third parties by grant beneficiaries in accordance with article 137 of the EU's Financial Regulation.

[10] This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo declaration of independence.

[11] THIS DESIGNATION SHALL NOT BE CONSTRUED AS RECOGNITION OF A STATE OF PALESTINE AND IS WITHOUT PREJUDICE TO THE INDIVIDUAL POSITIONS OF THE MEMBER STATES ON THIS ISSUE.

12 Classification used in the framework of the Development and Cooperation Instrument (DCI).

13 As above.

14 As above.

15 As above.

16 As above.

17 Classification used in the framework of the Partnership Instrument (PI).

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|---|---|
| **Region 13[18] Other Industrialised countries** | Australia, Brunei, Canada, Hong Kong, Japan, (Republic of) Korea, Macao, New Zealand, Singapore, Taiwan, United States of America. |
| **Region 14** | Faroe Islands, Switzerland |

For more information, please consult the detailed description of the Actions of the Programme in the Part B of this Guide.

### REQUIREMENTS REGARDING VISA AND RESIDENCE PERMITS

Participants in Erasmus+ projects may need to obtain a visa for staying abroad in the Programme or Partner Country hosting the activity. It is a responsibility of all the participating organisations to ensure that the authorisations required (short or long-term stay visas or residence permits) are in order before the planned activity takes place. It is strongly recommended that the authorisations are requested from the competent authorities well in advance, since the process may take several weeks. National Agencies and the Executive Agency may give further advice and support concerning visas, residence permits, social security, etc. The EU Immigration Portal contains general information on visa and residence permits, for both short-term and long-term stays: http://ec.europa.eu/immigration/tab2.do?subSec=11&language=7$en.

[18] Classification used in the framework of the Partnership Instrument (PI).

# PART B – INFORMATION ABOUT THE ACTIONS COVERED BY THIS GUIDE

In this Part readers will find, for all of the Actions and activities covered by the Erasmus+ Programme Guide, the following information:

- a description of their objectives and expected impact;
- a description of the supported activities;
- tables presenting the criteria which are used to assess project proposals;
- additional information useful in order to have a good understanding of the type of projects supported;
- a description of the funding rules.

Before submitting an application, applicants are advised to read carefully the entire section concerning the Action under which you wish to apply. Applicants are also advised to read carefully the complementary information provided in Annex I of this Guide.

# EDUCATION AND TRAINING

Opportunities in higher education, vocational education and training, school education and adult education.

## WHICH ACTIONS ARE SUPPORTED?

The following sections "Key Action 1", "Key Action 2" and "Key Action 3" present concrete Actions that are designed to achieve the Programme objectives in the field of education and training. Among these Actions, the ones mainly - but not exclusively - connected with the field of education and training are:

- Mobility projects for learners and staff in higher education and vocational education and training (VET);
- Mobility projects for staff in school education and adult education;
- Erasmus Mundus Joint Master Degrees;
- Erasmus+ Master Loans;
- Strategic Partnerships;
- Knowledge Alliances;
- Sector Skills Alliances (implemented through a specific call for proposals);
- Capacity Building in the field of higher education.

The Key Action 3 section also provides information about Erasmus+ activities in support to education and training policies, involving policy analysis and peer learning, initiatives for policy innovation, tools and networks, cooperation with international organisations and dialogue with policy makers, and stakeholder organisations. These activities are implemented through specific calls for proposals managed directly by the European Commission or by its Executive Agency. For more information, please visit the websites of the Commission and of the Executive Agency.

## WHAT ARE THE AIMS OF THESE ACTIONS?

### SPECIFIC OBJECTIVES

The specific objectives pursued by the Erasmus+ Programme in the field of education and training are to:

- improve the level of key competences and skills, with particular regard to their relevance for the labour market and their contribution to a cohesive society, in particular through increased opportunities for learning mobility and through strengthened cooperation between the world of education and training and the world of work;
- foster quality improvements, innovation excellence and internationalisation at the level of education and training institutions, in particular through enhanced transnational cooperation between education and training providers and other stakeholders;
- promote the emergence and raise awareness of a European lifelong learning area designed to complement policy reforms at national level and to support the modernisation of education and training systems, in particular through enhanced policy cooperation, better use of EU transparency and recognition tools and the dissemination of good practices;
- enhance the international dimension of education and training, in particular through cooperation between Programme and Partner-Country institutions in the field of VET and in higher education, by increasing the attractiveness of European higher education institutions and supporting the EU's external action, including its development objectives, through the promotion of mobility and cooperation between Programme and Partner-Country higher education institutions and targeted capacity building in Partner Countries;
- improve the teaching and learning of languages and promote the EU's broad linguistic diversity and intercultural awareness.

# YOUTH

Non-formal and informal learning opportunities in the youth field.

## WHICH ACTIONS ARE SUPPORTED?

The following sections "Key Action 1", Key Action 2" and "Key Action 3" present concrete Actions that are designed to achieve the Programme objectives in the field of youth. Among these Actions, the ones mainly - but not exclusively - connected with the field of youth (non-formal and informal learning) are:

- Mobility projects for young people (Youth Exchanges and Volunteering) and youth workers;
- Strategic Partnerships;
- Capacity Building in the field of youth;
- Meetings between young people and decision-makers in the field of youth.

The Key Action 3 section also provides information about Erasmus+ Actions in support of youth policies, involving policy analysis and peer learning, prospective initiatives, tools and networks, cooperation with international organisations, dialogue with stakeholder organisations, which will be promoted under Erasmus+ in support of youth systems. These Actions are implemented through specific calls for proposals managed by the European Commission's Executive Agency or directly by the European Commission. For more information, visit the websites of the Commission and of the Executive Agency.

## WHAT ARE THE AIMS OF THESE ACTIONS?

### SPECIFIC OBJECTIVES

The specific objectives pursued by the Erasmus+ Programme in the field of youth are to:

- improve the level of key competences and skills of young people, including those with fewer opportunities, as well as to promote participation in democratic life in Europe and the labour market, active citizenship, intercultural dialogue, social inclusion and solidarity, in particular through increased learning mobility opportunities for young people, those active in youth work or youth organisations and youth leaders, and through strengthened links between the youth field and the labour market;
- foster quality improvements in youth work, in particular through enhanced cooperation between organisations in the youth field and/or other stakeholders;
- complement policy reforms at local, regional and national level and to support the development of knowledge and evidence-based youth policy as well as the recognition of non-formal and informal learning, in particular through enhanced policy cooperation, better use of EU transparency and recognition tools and the dissemination of good practices;
- enhance the international dimension of youth activities and enhance the capacity of youth workers and organisations in their support for young people in complementarity with the European Union's external action, in particular through the promotion of mobility and cooperation between stakeholders from Programme and Partner Countries and international organisations.

Over the 2014-2020 period, 10% of the budget will be allocated in support of non-formal and informal learning opportunities in the youth field.

# THREE KEY ACTIONS

The Actions in the fields of education and training and youth will be presented together in the following sections, considering that:

- these Actions are all organised in a framework based on three Key Actions;
- several Actions are instruments to support the objectives in both the education and training and in the youth fields;
- the Erasmus+ Programme aims to promote synergies, cooperation and cross-fertilisation between the different fields.

This approach will also avoid unnecessary repetitions in this Guide.

# KEY ACTION 1: LEARNING MOBILITY OF INDIVIDUALS

## WHICH ACTIONS ARE SUPPORTED?

This Key Action supports:

- Mobility projects in the field of education, training and youth;
- Erasmus Mundus Joint Master Degrees;
- Erasmus+ Master Loans.

The Actions supported under this Key Action are expected to bring positive and long-lasting effects on the participants and participating organisations involved, as well as on the policy systems in which such activities are framed.

As regards students, trainees, apprentices, young people and volunteers, the mobility activities supported under this Key Action are meant to produce the following outcomes:

- improved learning performance;
- enhanced employability and improved career prospects;
- increased sense of initiative and entrepreneurship;
- increased self-empowerment and self-esteem;
- improved foreign language competences;
- enhanced intercultural awareness;
- more active participation in society;
- better awareness of the European project and the EU values;
- increased motivation for taking part in future (formal/non-formal) education or training after the mobility period abroad.

As regards staff, youth workers and professionals involved in education, training and youth, the mobility activities are expected to produce the following outcomes:

- improved competences, linked to their professional profiles (teaching, training, youth work, etc.);
- broader understanding of practices, policies and systems in education, training or youth across countries;
- increased capacity to trigger changes in terms of modernisation and international opening within their educational organisations;
- greater understanding of interconnections between formal and non-formal education, vocational training and the labour market respectively;
- better quality of their work and activities in favour of students, trainees, apprentices, pupils, adult learners, young people and volunteers;
- greater understanding and responsiveness to social, linguistic and cultural diversity;
- increased ability to address the needs of the disadvantaged;
- increased support for and promotion of mobility activities for learners;
- increased opportunities for professional and career development;
- improved foreign language competences;
- increased motivation and satisfaction in their daily work.

Activities supported under this Action are also expected to produce the following outcomes on participating organisations:

- increased capacity to operate at EU/international level: improved management skills and internationalisation strategies; reinforced cooperation with partners from other countries; increased allocation of financial resources (other than EU funds) to organise EU/international projects; increased quality in the preparation, implementation, monitoring and follow up of EU/international projects;

- innovative and improved way of operating towards their target groups, by providing for example: more attractive programmes for students, trainees, apprentices, young people and volunteers in line with their needs and expectations; improved qualifications of teaching and training staff; improved processes of recognition and validation of competences gained during learning periods abroad; more effective activities for the benefit of local communities, improved youth work methods and practices to actively involve young people and/or to address disadvantaged groups, etc.;

- more modern, dynamic, committed and professional environment inside the organisation: ready to integrate good practices and new methods into daily activities; open to synergies with organisations active in different social, educational and employment fields; planning strategically the professional development of their staff in relation to individual needs and organisational objectives; if relevant, capable of attracting excellent students and academic staff from all over the world.

In the long run, the combined effect of the several thousands of projects supported under this Key Action is expected to have an impact on the systems of education, training and youth in the participating countries, thus stimulating policy reforms and attracting new resources for mobility opportunities in Europe and beyond.

## MOBILITY PROJECTS IN THE FIELD OF EDUCATION, TRAINING AND YOUTH

### WHAT ARE THE AIMS OF A MOBILITY PROJECT?

Education, training and youth activities play a key role in providing people of all ages with the necessary means to participate actively in the labour market and in society at large. Projects under this Action promote transnational mobility activities targeting learners (students, trainees, apprentices, young people and volunteers), and staff (professors, teachers, trainers, youth workers, and people working in organisations active in the education, training and youth fields) and aiming to:

- support learners in the acquisition of learning outcomes (knowledge, skills and competences) with a view to improving their personal development, their involvement as considerate and active citizens in society and their employability in the European labour market and beyond;
- support the professional development of those who work in education, training and youth with a view to innovating and improving the quality of teaching, training and youth work across Europe;
- enhance notably the participants' foreign languages competence;
- raise participants' awareness and understanding of other cultures and countries, offering them the opportunity to build networks of international contacts, to actively participate in society and develop a sense of European citizenship and identity;
- increase the capacities, attractiveness and international dimension of organisations active in the education, training and youth fields so that they are able to offer activities and programmes that better respond to the needs of individuals, within and outside Europe;
- reinforce synergies and transitions between formal, non-formal education, vocational training, employment and entrepreneurship;
- ensure a better recognition of competences gained through the learning periods abroad.

This Action also supports international mobility activities from or to Partner Countries in the fields of higher education and youth. This action also contributes to cooperation between the EU and eligible Partner Countries and reflects the EU external action objectives, priorities and principles:

- enhance the attractiveness of higher education in Europe and support European higher education institutions in competing on the higher education market worldwide;
- support the priorities identified in the Communications “Increasing the impact of EU Development Policy: an Agenda for Change”[19] and "European Higher Education in the World"[20];
- support the internationalisation, attractiveness quality, equity of access and modernisation of higher education institutions outside Europe in view of promoting the development of Partner Countries;
- promote the development and external policy objectives and principles including national ownership, social cohesion, equity, proper geographical balance and diversity. Special attention will be given to the least developed countries as well as to disadvantaged students from poor socio-economic backgrounds and to students will special needs;
- promote non-formal learning and cooperation in the field of youth with Partner Countries.

### WHAT IS A MOBILITY PROJECT?

Organisations active in the fields of education, training and youth will receive support from the Erasmus+ Programme to carry out projects promoting different types of mobility. A mobility project will consist of the following stages:

- Preparation (including practical arrangements, selection of participants, set up of agreements with partners and participants, linguistic/intercultural/task-related preparation of participants before departure);

- Implementation of the mobility activities;

- Follow-up (including the evaluation of the activities, the formal recognition - where applicable - of the learning outcomes of participants during the activity, as well as the dissemination and use of the project's outcomes).

[19] Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Brussels, 13.10.2011, COM(2011) 637 Final.
[20] Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Brussels, 11.07.2013 COM(2013) 499 final.

An important innovation introduced in Erasmus+ compared to many actions of mobility supported under past European programmes is that Erasmus+ reinforces the support offered to the participants of mobility activities in improving their foreign language competences before and during their stay abroad. A European online linguistic support service was gradually introduced by the European Commission starting from the year 2014. The service provides the participants in long-term mobility activities with the opportunity to assess their knowledge of the language they will use to study, work or volunteer abroad as well as to follow an online language course to improve their competences. Participants with a level of at least B2 in the main language of instruction, work or volunteering may choose to follow an OLS course in the language of the receiving country, if available (more details on the support to language learning can be found in Annex I).

Furthermore, Erasmus+, more than in the past programmes, offers space for developing mobility activities that involve partner organisations with different backgrounds and active in different fields or socio-economic sectors (e.g. traineeships of university students or VET learners in enterprises, NGOs, public bodies; teachers in schools following professional development courses in companies or training centres; business experts giving lectures or training in higher education institutions, companies active in Corporate Social Responsibility developing volunteering schemes with associations and social enterprises, etc.).

A third important element of innovation and quality of mobility activities is that Erasmus+ participating organisations have the possibility to organise mobility activities within a broader strategic framework and in the medium term. Through a single grant application, covering a period of up to two years, the coordinator of a mobility project will be able to organise several mobility activities, allowing many individuals to go abroad to different countries. As a consequence, under Erasmus+ the applicant organisations will be able to conceive their project in line with the needs of participants, but also according to their internal plans for internationalisation, capacity building and modernisation.

Depending on the profile of participants involved, the following types of mobility projects are supported under Key Action 1 of the Erasmus+ Programme:

in the field of Education and Training:
- mobility project for higher education students and staff;
- mobility project for VET learners and staff;
- mobility project for school staff;
- mobility project for adult education staff.

in the field of Youth
- mobility project for young people and youth workers.

Long-term mobility of staff, the short and long-term mobility of pupils as well as the blended mobility of adult learners can be supported under Key Action 2 Strategic Partnerships.

The sections below provide the detailed information about the criteria and conditions applying to each typology of mobility project.

## MOBILITY PROJECT FOR HIGHER EDUCATION STUDENTS AND STAFF

This mobility project can comprise one or more of the following activities:

**Student mobility:**

Student mobility can be in any subject area/academic discipline. To ensure high-quality mobility activities with maximum impact on the students, the mobility activity has to be compatible with the student's degree-related learning and personal development needs.

Students may carry out either one or a combination of the activities described below:

- **a study period** abroad at a partner higher education institution (HEI);

The study period abroad must be part of the student's study programme to complete a degree at a short cycle, first cycle (Bachelor or equivalent), second cycle (Master or equivalent) and third or doctoral cycle.

A study period abroad may include a traineeship period as well. Such a combination creates synergies between the academic and professional experience abroad and may be organised in different ways depending on the context: either one activity after the other or both at the same time. The combination follows the funding rules and minimum duration of study mobility.

- **a traineeship (work placement)** abroad in an enterprise or any other relevant workplace[21]. Traineeships abroad at a workplace are supported during short cycle, first, second, third cycle studies and, in the case of mobility within Programme Countries, within a maximum of one year after the student's graduation. This also includes the 'assistantships' for student teachers.

In order to better support students to acquire the skills necessary for their future, a partnership between the Erasmus+ and Horizon 2020 programmes has been established. This partnership will provide and promote further traineeship opportunities for students and recent graduates who wish to acquire digital skills[22] and competences required to perform jobs and thrive in an economy and society which is being continuously digitally transformed. Students and recent graduates from all disciplines are invited to apply for a traineeship in these domains. These traineeships are expected to take place in the EU Member States as well as in Horizon 2020 associated countries.

Wherever possible, the traineeships should be an integrated part of the student's study programme.

**Staff mobility:**

- **teaching periods:** this activity allows HEI teaching staff or staff from enterprises to teach at a partner HEI abroad. Staff mobility for teaching can be in any subject area/academic discipline.

- **training periods:** this activity supports the professional development of HEI teaching and non-teaching staff in the form of training events abroad (excluding conferences) and job shadowing/observation periods/training at a partner HEI, or at another relevant organisation abroad.

A period abroad can combine teaching and training activities.

In 2018, in the grant allocation for mobility of staff between Programme Countries, emphasis will be put on training periods for HEI teaching staff that allow them to develop pedagogical and curriculum design skills.

[21] Following courses at a higher education institution cannot be considered as a traineeship.

[22] Any traineeship will be considered as a "traineeship in digital skills" when one or more of the following activities are practised by the trainee: digital marketing (e.g. social media management, web analytics); digital graphical, mechanical or architectural design; development of apps, software, scripts, or websites; installation, maintenance and management of IT systems and networks; cybersecurity; data analytics, mining and visualisation; programming and training of robots and artificial intelligence applications. Generic customer support, order fulfilment, data entry or office tasks are not considered in this category.

The majority of the budget of this Action will support activities involving mobility between Programme Countries. However, a limited amount of the budget available for this Action can fund international activities between Programme and all Partner Countries of the world, except regions 5 and 12 (see section "eligible countries" in Part A of this Guide).

Funding for mobility between Programme and Partner Countries comes from several financial instruments of the European Union for external cooperation. To ensure that this action follows the EU's external priorities, the Commission has set a number of targets and rules for cooperation with Partner Countries.

Applicants for mobility projects between Programme and Partner countries should take into account the available budget for mobility with different regions of the world and the priorities explained hereafter in the section "additional information for mobility between Programme and Partner Countries".

### WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN THIS PROJECT?

Participating organisations involved in the mobility project assume the following roles and tasks:

- Applicant organisation from a Programme Country: in charge of applying for the mobility project, signing and managing the grant agreement and reporting. The applicant can be a consortium coordinator: leading a mobility consortium of partner organisations of the same country aimed at organising any type of student and staff mobility.
- Sending organisation: in charge of selecting students/staff and sending them abroad. This also includes grant payments (for those in Programme Countries), preparation, monitoring and recognition related to the mobility period.
- Receiving organisation: in charge of receiving students/staff from abroad and offering them a study/traineeship programme or a programme of training activities, or benefiting from a teaching activity.
- Intermediary organisation: this is an organisation active in the labour market or in the fields of education, training and youth work in a Programme Country. It may be a partner in a national mobility consortium, but is not a sending organisation. Its role may be to share and facilitate the administrative procedures of the sending higher education institutions and to better match student profiles with the needs of enterprises in case of traineeships and to jointly prepare participants.

For mobility between Programme and Partner Countries, only organisations from Programme Countries can apply and administer the payments for inbound and outbound mobility.

The sending and receiving organisations, together with the students/staff, must have agreed on the activities to be undertaken by the students - in a 'Learning Agreement' - or by staff members - in a 'Mobility Agreement' - prior to the start of the mobility period. These agreements define the target learning outcomes for the learning period abroad, specify the formal recognition provisions and list the rights and obligations of each party. When the activity is between two higher education institutions (student mobility for studies and staff mobility for teaching), an 'inter-institutional agreement' has to be in place between the sending and the receiving institutions before the exchanges can start.

By signing the Erasmus Charter for Higher Education (ECHE), higher education institutions commit to provide all the necessary support to mobile participants, including linguistic preparation. To support them, online linguistic support is being gradually implemented in the course of the Programme for all long-term mobility activities between Programme Countries lasting two months and longer. It is made available by the European Commission to eligible participants to assess their foreign language competences and to offer, where necessary, the most appropriate language learning before and/or during mobility (for more details, see Annex I of this Guide). Partner Country higher education institutions are not eligible to sign the ECHE, therefore details of the linguistic support offered to mobile participants should be made explicit in the inter-institutional agreement.

### WHAT ARE THE CRITERIA USED TO ASSESS THIS PROJECT?

Here below are listed the formal criteria that a higher education mobility project must respect in order to be eligible for an Erasmus+ grant:

**GENERAL ELIGIBILITY CRITERIA**

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| **Who can apply?** | ▪ For an application as individual HEI: higher education institutions established in a Programme Country and awarded with an Erasmus Charter for Higher Education (ECHE). For more information on the Charter, see the section "Erasmus Charter for Higher Education" below and the Annex I of this Guide).<br><br>▪ For an application as national mobility consortium: coordinating organisations established in a Programme Country and coordinating a consortium awarded with a higher education consortium accreditation. Organisations that do not hold a valid consortium accreditation can apply for this accreditation on behalf of a Mobility Consortium at the same time of applying for a mobility project grant. All the involved higher education institutions from eligible Programme countries must hold an Erasmus Charter for Higher Education (ECHE). These organisations will be eligible for a mobility project only if their application for the consortium accreditation is successful.<br><br>Higher education students and staff cannot apply directly for a grant; the selection criteria for participation in the mobility activities are defined by the higher education institution in which they study or are employed, in accordance with the provisions foreseen in Annex I to this Guide. |
| **Eligible activities** | A higher education mobility project must comprise one or more of the following activities:<br>▪ Student mobility for studies;<br>▪ Student mobility for traineeships;<br>▪ Staff mobility for teaching;<br>▪ Staff mobility for training. |
| **Eligible countries** | Mobility between Programme Countries:<br>▪ any Programme Country<br>Mobility between Programme and Partner Countries:<br>▪ any Programme Country; and<br>▪ any Partner Country of the world, except regions 5 and 12 (see section "eligible countries" in Part A of this Guide) |
| **Number of participating organisations** | The number of organisations in the application form is one (the applicant). It is either a single HEI or a national mobility consortium coordinator established in a Programme Country.<br>During the implementation of the mobility project, a minimum of two organisations (at least one sending and at least one receiving organisation) from different Programme Countries must be involved. For mobility projects involving Partner Countries, the minimum is one from a Programme Country and one from an eligible Partner Country. |
| **Duration of project** | The applicant must choose the duration at application stage, based on the scale of the project and on the type of activities planned over time.<br>Mobility between Programme Countries: 16 or 24 months.<br>Mobility between Programme and Partner Countries: 16 or 26 months. |
| **Where to apply?** | To the National Agency of the country in which the applicant organisation is established. |
| **When to apply?** | Applicants have to submit their grant application by **1 February at 12:00 (midday Brussels time)** for projects starting on 1 June of the same year. |
| **How to apply?** | Please see part C of this Guide for details on how to apply. |
| **Other criteria** | A HEI may apply for grants to its National Agency via two different channels:<br><br>• directly as an individual HEI,<br>• via a consortium of which it is a member.<br><br>A HEI can apply only once per selection round for a mobility project between Programme Countries as individual HEI and/or as member of a given consortium. However, a HEI may be part of or coordinate several different national mobility consortia applying at the same time. The same applies to mobility projects between Programme and Partner Countries.<br><br>Both channels (individual application and consortium application) may be used simultaneously. However, the HEI/department remains responsible of preventing double funding of a participant when the two channels are used in the same academic year. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

**ADDITIONAL ELIGIBILITY CRITERIA DURING IMPLEMENTATION FOR STUDENT MOBILITY**

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| **Eligible participating organisations** | ▪ **Student mobility for studies:**<br>All participating Programme Country organisations (both sending and receiving) must be HEIs awarded with an ECHE. All Partner Country organisations must be HEIs recognised by competent authorities and have signed inter-institutional agreements with their Programme Country partners before the mobility takes place.<br>▪ **Student mobility for traineeships:**<br>In the case of mobility between Programme Countries, the sending organisation must be a HEI awarded with an ECHE.<br>In the case of mobility between Programme and Partner Countries, the sending organisation must be a Programme Country HEI awarded with an ECHE or a Partner Country HEI recognised by competent authorities that has signed inter-institutional agreements with their Programme Country partners before the mobility takes place.<br><br>The receiving organisation can be[23]:<br>o any public or private organisation active in the labour market or in the fields of education, training and youth. For example, such organisation can be:<br>– a public or private, a small, medium or large enterprise (including social enterprises);<br>– a public body at local, regional or national level;<br>– a social partner or other representative of working life, including chambers of commerce, craft/professional associations and trade unions;<br>– a research institute;<br>– a foundation;<br>– a school/institute/educational centre (at any level, from pre-school to upper secondary education, and including vocational education and adult education);<br>o a non-profit organisation, association, NGO;<br>o a body providing career guidance, professional counselling and information services;<br>o a Programme Country HEI awarded with an ECHE. |
| **Duration of the activity** | **Study periods**: from 3[24] to 12 months (including a complementary traineeship period, if planned).<br>**Traineeships**: from 2 to 12 months.<br>The same student may participate in mobility periods totalling up to 12 months[25] maximum per each cycle of study[26], independently of the number and type of mobility activities. Participation with a zero-grant from EU funds counts as well towards this maximum duration :<br>▪ during the first study cycle (Bachelor or equivalent) including the short-cycle (EQF levels 5 and 6);<br>▪ during the second study cycle (Master or equivalent - EQF level 7); and<br>▪ during the third cycle as doctoral candidate (doctoral level or EQF level 8).<br>The duration of a traineeship by recent graduates counts towards the 12 months maximum of the cycle during which they apply for the traineeship. |

[23] The following types of organisations are not eligible as receiving organisations for student traineeships:
EU institutions and other EU bodies including specialised agencies (their exhaustive list is available on the website - http://europa.eu/european-union/about-eu/institutions-bodies_en); organisations managing EU programmes such as Erasmus+ National Agencies (in order to avoid a possible conflict of interests and/or double funding).
[24] Minimum duration of a study period is 3 months, or 1 academic term or trimester.
[25] Prior experience under LLP-Erasmus Programme and/or as Erasmus Mundus scholarship holders counts towards the 12 months per study cycle.
[26] In one-cycle study programmes, such as Medicine, students can be mobile for up to 24 months.

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| **Venue(s) of the activity** | Students must carry out their mobility activity in a Programme or Partner Country different from the country of the sending organisation and the country where the student has his/her accommodation during his/her studies[27]. |
| **Eligible participants** | Students registered in a HEI and enrolled in studies leading to a recognised degree or another recognised tertiary level qualification (up to and including the level of doctorate). In case of mobility for studies, the student must be enrolled at least in the second year of higher education studies. For traineeships, this condition does not apply.<br>Recent higher education graduates may participate in a traineeship between Programme Countries. Recent graduates must be selected by their HEI during their last year of study, and must carry out and complete their traineeship abroad within one year of obtaining their graduation. |

**ADDITIONAL ELIGIBILITY CRITERIA DURING IMPLEMENTATION FOR STAFF MOBILITY**

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| **Eligible participating organisations** | ▪ **Staff mobility for teaching:**<br>The receiving organisation must be a Programme Country HEI awarded with an ECHE or a Partner Country HEI recognised by competent authorities and having signed an inter-institutional agreement with the sending Programme Country partner before the mobility takes place.<br>The sending organisation must be:<br>o a Programme Country HEI awarded with an ECHE, or a Partner Country HEI recognised by competent authorities and having signed an inter-institutional agreement with the receiving Programme Country partner; or<br>o in the case of staff invited to teach at HEI; any public or private organisation (not awarded with an ECHE) active in the labour market or in the fields of education, training and youth. For example, such organisation can be:<br>– a public or private, a small, medium or large enterprise (including social enterprises);<br>– a public body at local, regional or national level;<br>– a social partner or other representative of working life, including chambers of commerce, craft/professional associations and trade unions;<br>– a research institute;<br>– a foundation;<br>– a school/institute/educational centre (at any level, from pre-school to upper secondary education, and including vocational education and adult education);<br>– a non-profit organisation, association, NGO;<br>– a body providing career guidance, professional counselling and information services.<br>▪ **Staff mobility for training:**<br>The sending organisation must be a Programme Country HEI awarded with an ECHE or a Partner Country HEI recognised by competent authorities and having signed an inter-institutional agreement with the receiving Programme Country partner before the mobility takes place.<br>The receiving organisation must be:<br>o a Programme Country HEI awarded with an ECHE, or a Partner Country HEI recognised by competent authorities and having signed an inter-institutional agreement with the receiving Programme Country partner; or<br>o any Programme Country public or private organisation active in the labour market or in the fields of education, training and youth. See examples in the previous page. |

[27] In the case of branch campuses that are dependent on the parent institution and covered by the same ECHE, the country where the parent institution is located will be considered as the sending country. Therefore, it is not possible to organise Erasmus+ mobilities between branch campuses and the parent institution covered by the same ECHE.

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| **Duration of the activity** | From 2 days (5 days from and to Partner Countries) to 2 months, excluding travel time. In mobility between Programme Countries, the minimum 2 days must be consecutive. A teaching activity has to comprise a minimum of 8 hours of teaching per week (or any shorter period of stay). This minimum does not apply to invited staff from enterprises.<br>If the teaching activity is combined with a training activity during a single period abroad, the minimum number of hours of teaching per week (or any shorter period of stay) is reduced to 4 hours.<br>If the mobility lasts longer than one week, the minimum number of teaching hours for an incomplete week should be proportional to the duration of that week. |
| **Venue(s) of the activity** | Staff must carry out their mobility activity in any Programme Country or Partner Country different from the country of the sending organisation and the staff country of residence. |
| **Eligible participants** | **Staff mobility for teaching**:<br>• staff working in a Programme or Partner Country HEI.<br>• Staff from enterprises invited to teach at an HEI in a Programme or Partner Country from any enterprise working in a programme or partner country, public or private organisation (not awarded with an ECHE) active in the labour market or in the fields of education, training and youth (including employed doctoral candidates).<br>**Staff mobility for training**: staff working in a Programme or Partner Country HEI. |

#### ADDITIONAL INFORMATION FOR MOBILITY BETWEEN PROGRAMME AND PARTNER COUNTRIES

The budget available for mobility between Programme and Partner Countries is divided between different regions of the world in 12 budgetary envelopes and the size of each budgetary envelope is different. Further information on the amounts available under each budgetary envelope will be published on the National Agencies' websites.

In general the funds will have to be used in a geographically balanced way. The EU has set a number of targets regarding geographical balance and priorities that have to be attained at European level over the whole duration of the programme (2014-2020). The targets do not have to be attained by individual higher education institutions, but National Agencies will take these targets into account in order to allocate the available budget. In addition, higher education institutions are encouraged to work with partners in the poorest and least developed Partner Countries.

These are the **geographical targets** set for mobility between Programme and Partner Countries at EU level by 2020:

- With Developing Asia and Latin America, 25% of the funds should be used to organise mobility with the least developed countries of the region. These countries are:
  - For Asia: Afghanistan, Bangladesh, Cambodia, Laos, Nepal, Bhutan and Myanmar;
  - For Latin America: Bolivia, El Salvador, Guatemala, Honduras, Nicaragua and Paraguay;
- No more than 30% of the budget available for Asia should be spent on mobility with China and India;
- And no more than 35 % available for Latin America on Brazil and Mexico.

Due to the requirement to carry out mobilities with countries in regions 6, 7, 8, 9, 10 and 11[28] that contribute to development assistance, mobility for short-, first- and second cycle students is limited to inbound mobility from Partner to Programme Countries[29]. Outbound mobility towards these regions is only available at doctoral level and for staff.

There will however be a few exceptions for certain Programme Countries. Please check your National Agency's website.

Finally, higher education institutions are free to apply for 100% staff mobility or 100% student mobility or any combination thereof, provided this complies with any secondary criteria set by the National Agency (see section below).

[28] Indicative only. Subject to the provisions of the revised Cotonou Partnership Agreement and multiannual financial framework 2014-2020.

[29] See section "eligible countries" in Part A of this Guide.

### SECONDARY CRITERIA FOR MOBILITY BETWEEN PROGRAMME AND PARTNER COUNTRIES SET BY NATIONAL AGENCIES

Where the budget envelope for a particular Partner Region or Country is limited, a National Agency may choose to add one or more secondary criteria from the list below. In the event that a National Agency chooses to use secondary criteria this decision will be communicated in advance of the deadline, in particular on the National Agency's website.

- The degree level (for example limiting applications to one or two cycles only – BA, MA or PhD);
- Privileging only staff or only student mobility;
- Limiting the duration of mobility periods (for example limiting student mobility to 6 months, or limiting staff mobility to 10 days).

### AWARD CRITERIA FOR A MOBILITY PROJECT WITHIN PROGRAMME COUNTRIES[30]

There is no qualitative assessment (the quality has been assessed at the ECHE application stage or when selecting a national mobility consortium) and therefore there are no award criteria.

Any eligible grant application (after having passed the eligibility check) will get funding.

The maximum grant amount awarded will depend on a number of elements:

- the number of mobility periods and months/days applied for;
- the past performance of the applicant in terms of number of mobility periods, good quality in the implementation of activities and sound financial management, in case the applicant has received a similar grant in previous years;
- the total national budget allocated for the mobility Action.

### AWARD CRITERIA FOR A MOBILITY PROJECT BETWEEN PROGRAMME AND PARTNER COUNTRIES

Eligible grant applications (after having passed the eligibility check) will be assessed on the basis of the following criteria:

| | |
|---|---|
| **Relevance of the strategy (maximum 30 points)** | The extent to which the planned mobility project is relevant to the internationalisation strategy of the higher education institutions involved (both in the Programme and in the Partner country) and the rational for choosing staff and/ or student mobility. |
| **Quality of the cooperation arrangements (maximum 30 points)** | The extent to which the applicant organisation has previous experience of similar projects with higher institutions/organisations in the partner country and the clarity of the description of responsibilities, roles and tasks between partners. |
| **Quality of the activity design and implementation (maximum 20 points)** | The completeness and quality of arrangements for the selection of participants, the support provided to them and the recognition of their mobility period (in particular in the Partner country). |
| **Impact and dissemination (maximum 20 points)** | The potential impact of the project on participants, beneficiaries, partner organisations, at local, regional and national levels and the quality of measures aimed at disseminating the results of the mobility project at faculty and institution levels, and beyond where applicable, in both the programme and partner countries. |

The applicant will explain how the project meets these four criteria from the point of view of its own institution (or institutions in the case of applications submitted by consortia) and the Partner Country institutions.

To be considered for funding, proposals must score at least 60 points in total, with a minimum of 15 points for "relevance of the strategy".

[30] Mobility in both directions

In order to allocate the available budget for each region, the mobilities planned with each Partner Country will be listed in order of merit in a regional ranking.

The grant awarded to a higher education institution will depend on a number of elements:

- the number of mobility periods and months/days applied for;
- the budget allocated per country or region;
- the geographical balance within a given region or sub-region.

The National Agency may fund mobilities with a Partner Country that is ranked lower in the regional ranking, when it is necessary to ensure geographical balance within that region, as defined by the geographical targets mentioned above.

The National Agency is not obliged to fund all the mobilities requested for a particular Partner Country if the request is considered excessive with respect to the budget available.

Where possible and in addition to the overarching criteria of order of merit and geographical balance, the National Agency will seek to spread the available budget widely to avoid dominance of a small number of HEIs. The National Agency will strive to be as inclusive as possible, maximising participation of stakeholders without undermining quality, geographic balance or the minimum critical size per mobility project to ensure feasibility.

## WHAT ACCREDITATION DO APPLICANTS NEED FOR THIS MOBILITY PROJECT?

### ERASMUS CHARTER FOR HIGHER EDUCATION

The award of an Erasmus Charter for Higher Education (ECHE) is a pre-requisite for all higher education institutions established in a Programme Country that wish to participate in a Higher Education mobility project either as a single higher education institution or as a member of a national mobility consortium. Every year, the European Commission - via the Education, Audiovisual and Culture Executive Agency – publishes a specific call for proposals that sets the detailed conditions to be followed and qualitative criteria to be met in order to be awarded with an ECHE. This call is available on the website of the Executive Agency.

For HEIs established in a Partner Country, the HEI must be accredited by the relevant national accreditation organisation. As they are not eligible to receive an ECHE, they must in addition have established an inter-institutional agreement with their Programme Country partner(s) which encapsulates the principles of the ECHE.

### CONSORTIUM ACCREDITATION IN HIGHER EDUCATION

An organisation from a Programme Country, applying on behalf of a national mobility consortium, must hold a valid consortium accreditation. This accreditation is awarded by the same National Agency that assesses the request of funding for a higher education mobility project. The requests for accreditation and for mobility projects grant can be made at the same time. However, the grant for mobility projects will be awarded only to those HEIs and organisations that are successful at the end of the accreditation process. To obtain a consortium accreditation, the following conditions must be met:

### ELIGIBILITY CRITERIA

| | |
|---|---|
| **Eligible participating organisations** | A national mobility consortium in higher education can be composed of the following participating organisations:<br>▪ higher education institutions holding a valid Erasmus Charter for Higher Education (for more information on the Charter, see the section "Erasmus Charter for Higher Education" above and the Annex I of this Guide); and<br>▪ any public or private organisation active in the labour market or in the fields of education, training and youth (see examples of eligible participating organisations in the previous page).<br>Each participating organisation must be established in the same Programme Country. |
| **Who can apply?** | Any eligible participating organisation can act as coordinator and apply on behalf of all the organisations involved in the consortium. |

| | |
|---|---|
| **Number of participating organisations** | A national mobility consortium must comprise minimum three eligible participating organisations, including two sending HEIs.<br>All member organisations of the national mobility consortium must be identified at the time of applying for the consortium accreditation. |
| **Duration of the consortium accreditation** | All consecutive annual calls and no later than call 2020. |
| **Where to apply?** | To the National Agency of the country in which the applicant organisation is established. |
| **When to apply?** | Applicants have to submit their accreditation application by **1 February at 12:00 (midday Brussels time)** for projects starting on 1 June of the same year. |
| **How to apply?** | Please see part C of this Guide for details on how to apply. |

**AWARD CRITERIA**

The application for accreditation will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the consortium (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives of the Action (see section "What are the aims of a mobility project");<br>- the needs and objectives of the organisations participating in the consortium and of the individual participants.<br>▪ The extent to which the proposal is suitable for:<br>- producing high-quality learning outcomes for participants;<br>- reinforcing the capacities and international scope of the organisations participating in the consortium;<br>- bringing added value at EU level through results that would not be attained by activities carried out by each single HEI. |
| **Quality of the consortium composition and the cooperation arrangements (maximum 20 points)** | ▪ The extent to which:<br>- the consortium involves an appropriate composition of sending higher education institutions with, where relevant, complementary participating organisations from other socio-economic sectors with the necessary profile, experience and expertise to successfully deliver all aspects of the project;<br>- the consortium coordinator has previous experience in managing a consortium or a similar project type;<br>- the distribution of roles, responsibilities and tasks/resources is well defined and demonstrates the commitment and active contribution of all participating organisations;<br>- tasks/resources are pooled and shared;<br>- the responsibilities are clear for contractual and financial management issues;<br>- the consortium involves newcomers to the Action. |
| **Quality of the consortium activity design and implementation (maximum 20 points)** | ▪ The clarity, completeness and quality of all the phases of a mobility project (preparation, implementation of mobility activities, and follow-up);<br>▪ The quality of the practical arrangements, management and support modalities (e.g. finding receiving organisations, matchmaking, information, linguistic and intercultural support, monitoring);<br>▪ The quality of cooperation, coordination and communication between the participating organisations, as well as with other relevant stakeholders;<br>▪ Where relevant, the quality of arrangements for the recognition and validation of participants' learning outcomes, as well as the consistent use of European transparency and recognition tools;<br>▪ If applicable, the appropriateness of measures for selecting participants in the mobility activities and for promoting disadvantaged persons to participate in mobility activities. |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the activities led by the consortium;<br>▪ The potential impact of the project:<br>- on participants and participating organisations during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at institutional, local, regional, national and/or international levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the activities led by the consortium within and outside the participating organisations and partners. |

To be selected for accreditation, proposals must score at least 60 points in total. Furthermore, they must score at least half of the maximum points for each award criterion.

### WHAT ELSE SHOULD YOU KNOW ABOUT THIS ACTION?

More specific rules and criteria and additional useful information relating to this Action can be found in the Annex I of this Guide. Interested organisations are invited to read carefully the relevant sections of this Annex before applying for financial support.

### WHAT ARE THE FUNDING RULES?

In the application form, the applicants of mobility projects for higher education students and staff will have to provide the following information:

- number of students and staff that are supposed to take part in mobility activities;
- total duration of the planned mobility activities;

On this basis, the Programme Country National Agencies will award a grant to applicants to support a certain number of mobility activities, up to the maximum number requested by the applicant.

If the applicant submits mobility projects with Partner Countries, it will fill in a separate application form dedicated to mobility to and from Partner Countries.
A separate grant will be awarded for mobilities with Partner Countries.

The following rules will apply to support financially these activities:

#### A) FUNDING RULES APPLYING TO ALL MOBILITY ACTIVITIES

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Organisational Support** | Costs directly linked to the implementation of mobility activities (excluding subsistence and travel for participants) | Contribution to unit costs | In the case of mobility between Programme Countries: up to the 100th participant: 350 EUR per participant, and beyond the 100th participant: 200 EUR per additional participant<br><br>In the case of mobility between Programme and Partner Countries: 350 EUR per participant | Based on the number of mobility participants |
| **Special needs support** | Additional costs directly related to participants with special needs | Real costs | Up to 100% of eligible costs, as approved by the National Agency. | Conditional: the request for financial support must be motivated and well justified in a specific application form once participants have been selected |
| **Exceptional costs** | Costs for providing a financial guarantee, if the National Agency asks for it.<br><br>In the case of mobility between Programme Countries: Expensive travel costs of participants | Real costs | Costs for financial guarantee: 75% of eligible costs<br><br>Expensive travel costs: maximum up to 80% of travel costs | Conditional: the request for financial support must be motivated and well justified once participants have been selected |

**ORGANISATIONAL SUPPORT GRANT FOR THE BENEFICIARY (HIGHER EDUCATION INSTITUTIONS OR CONSORTIA):**

The organisational support grant is a contribution to any cost incurred by the institutions in relation to activities in support of student and staff mobility, both inbound and outbound, to comply with the Erasmus Charter for Higher Education in Programme Countries, and with the principles of the ECHE as reflected in the inter institutional agreements agreed in the case of institutions from Partner Countries. For example:

- organisational arrangements with partner institutions, including visits to potential partners, to agree on the terms of the inter-institutional agreements for the selection, preparation, reception and integration of mobile participants; and to keep these inter-institutional agreements updated;
- provide updated course catalogues for international students;
- provide information and assistance to students and staff;
- selection of students and staff;
- preparation of the learning agreements to ensure full recognition of the students' educational components; preparation and recognition of mobility agreements for staff;
- linguistic and intercultural preparation provided to both incoming and outbound students and staff, complementary to the Erasmus+ Online Linguistic Support;
- facilitate the integration of incoming mobile participants in the HEI;
- ensure an efficient mentoring and supervision arrangements of mobile participants;
- specific arrangements to ensure the quality of student traineeships in enterprises;
- ensure recognition of the educational components and related credits, issuing transcript of records and diploma supplements;
- support the reintegration of mobile participants and build on their acquired new competences for the benefit of the HEI and peers.

Higher education institutions in both Programme and Partner Countries commit themselves to comply with all the principles of the Charter to ensure mobility of high quality, including these ones: "ensure that outgoing mobile participants are well prepared for the mobility, including having attained the necessary level of linguistic proficiency" and "provide appropriate linguistic support to incoming mobile participants". Advantages can be taken of existing facilities within the institutions for language training. Those HEIs which would be able to provide student and staff mobility of high quality, including linguistic support, at a lower cost (or because it is funded under other sources than EU funding) would have the possibility to transfer a share of the organisational support grant to fund more mobility activities. The grant agreement specifies the level of flexibility in this regard.

In all cases, beneficiaries will be contractually obliged to deliver such high quality services and their performance will be monitored and checked by National Agencies, taking into account also the feedback provided by students and staff via Mobility Tool+ and directly accessible to the National Agencies and the Commission.

In the case of mobility within Programme Countries, the organisational support grant is calculated on the number of all supported outbound mobile participants (including mobile participants with a zero-grant from EU funds for the entire mobility period – see below) and incoming staff from enterprises teaching at an HEI, that is the beneficiary or a member of the national mobility consortium. Mobile participants with a zero-grant from EU funds for the entire mobility period count as supported mobile participant as they benefit from the mobility framework and organisational activities. Organisational support is therefore also paid for these participants.

In the case of mobility between Programme and Partner Countries, the organisational support grant is calculated on the number of granted mobilities, including all supported outbound mobile participants from Programme Countries and all inbound mobile participants from Partner Countries. Mobile participants with a zero-grant from EU funds for the entire mobility period may count as supported mobile participant as they benefit from the mobility framework and organisational activities. This excludes persons accompanying participants during their activity abroad, and additional mobilities that may be organised by transferring funds between budget categories.

In the case of national mobility consortia, this grant can be shared among all the national members according to rules that they will have agreed among themselves. For mobility between Partner and Programme Countries, the organisational support grant will be shared by the partners concerned on a mutually acceptable basis decided upon by the participating institutions.

#### MOBILE PARTICIPANTS WITH A ZERO-GRANT FROM EU FUNDS

Students and staff with a zero-grant from EU funds are mobile participants that do not receive an EU grant related to travel and subsistence, but they otherwise fulfil all student and staff mobility criteria and benefit from all advantages of being Erasmus+ student and staff. They may receive a regional, national or other type of grant to contribute to their mobility costs. The number of mobile participants with a zero-grant from EU funds for the entire mobility period counts in the statistics for the performance indicator used to allocate the EU budget between the countries, both for mobility within Programme Countries and for mobility between Programme and Partner Countries.

#### SPECIAL NEEDS SUPPORT

A person with special needs is a potential participant whose individual physical, mental or health-related condition is such that his/her participation in the project / mobility Action would not be possible without extra financial support. Higher education institutions that have selected students and/or staff with special needs can apply for additional grant support to the National Agency in order to cover the supplementary costs for their participation in the mobility activities. For persons with special needs, the grant support may therefore be higher than the maximum individual grant amounts set out below. Higher education institutions will describe on their website how students and staff with special needs can request such additional grant support.

Extra funding for students and staff with special needs may be provided also from other sources at local, regional and/or national level.

As regards the accompanying persons for students and staff with special needs, they are entitled to receive a contribution based on real costs.

Each higher education institution, by signing the Erasmus Charter for Higher Education, commits to ensuring equal access and opportunities to participants from all backgrounds. Therefore, students and staff with special needs can benefit from the support services that the receiving institution offers to its local students and staff.

#### EXCEPTIONAL COSTS

Only participants eligible for a standard travel grant are eligible for exceptional costs for expensive travel:

Beneficiaries of mobility projects will be allowed to claim financial support for exceptional travel costs of participants under the budget heading "exceptional costs" (up to a maximum of 80% of travel costs. This would be allowed provided that applicants can justify that the standard funding rules (based on unit costs per travel distance band) do not cover at least 70% of the travel costs of participants.

#### OTHER SOURCES OF FUNDING

Students and staff may receive, on top of the EU grant, or in replacement of the EU grant (mobile participants with a zero-grant from EU funds) regional, national or any other type of grant, managed by another organisation than the National Agency (e.g. Ministry or regional authorities). This type of grants provided by other sources of funding than the EU budget is not subject to the amounts and min/max ranges set in this document.

### B) GRANT SUPPORT FOR THE MOBILITY OF STUDENTS

Students may receive an EU grant as a contribution to their costs for travel and subsistence during the period of study or traineeship abroad. These amounts will be defined by the National Agencies in agreement with National Authorities, and/or the higher education institutions on the basis of objective and transparent criteria as described below. The exact amounts will be published on the websites of National Agencies and of higher education institutions.

Programme Countries are divided into the three following groups:

| | |
|---|---|
| **Group 1<br>Programme Countries with higher living costs** | Denmark, Finland, Iceland, Ireland,, Luxembourg, Sweden, United Kingdom, Liechtenstein, Norway, |
| **Group 2<br>Programme Countries with medium living costs** | Austria, Belgium, ,Germany, France, Italy, Greece, Spain, Cyprus, Netherlands, Malta, Portugal, |
| **Group 3<br>Programme Countries with lower living costs** | Bulgaria, Croatia, Czech Republic, Estonia, Latvia, Lithuania, Hungary, ,Poland, Romania, Slovakia, Slovenia, former Yugoslav Republic of Macedonia, Turkey |

#### MOBILITY WITHIN PROGRAMME COUNTRIES - CRITERION 1 – SENDING AND RECEIVING COUNTRIES OF THE STUDENT

The EU grant provided to students will depend on their mobility flow, as follows:

- mobility towards a country with similar living costs: students will receive the medium range EU grant;
- mobility towards a country with higher living costs: students will receive the higher range EU grant;
- mobility towards a country with lower living costs: students will receive the lower range EU grant.

The amounts defined by National Agencies will be set within the following minimum and maximum ranges:

- Medium range EU grant: a medium range, between **220 and 470 EUR per month,** will apply to mobility activities towards a country of similar living costs: a) from Group 1 to Group 1, b) from Group 2 to Group 2 and c) from Group 3 to Group 3.

- Higher range EU grant: corresponds to the medium range applied by the National Agency plus at least 50 EUR and between **270 and 520 EUR per month.** It applies to mobility activities towards a country of higher living costs: a) from Group 2 to Group 1 countries and b) from Group 3 to Group 1 and 2 countries.

- Lower range EU grant: corresponds to the medium range applied by the National Agency minus at least 50 EUR and between **170 and 420 EUR per month.** It applies to mobility activities towards a country of lower living costs: a) Group 1 to Group 2 and 3 countries and b) from Group 2 to Group 3.

When defining the amounts to be applied by beneficiaries in their country, National Agencies will consider two specific criteria:

- the availability and the level of other sources of co-financing from private or public bodies at local, regional or national level to complement the EU grant;
- the general level of demand of students who intend to study or receive training abroad.

National Agencies may decide to grant flexibility to their higher education institutions by fixing ranges instead of amounts at national level. This should be based on justified grounds, for example in countries where co-financing is available at regional or institutional level.

#### MOBILITY WITHIN PROGRAMME COUNTRIES - CRITERION 2 - ADDITIONAL SUPPORT FOR SPECIFIC TARGET GROUPS, ACTIVITIES AND SENDING COUNTRIES/REGIONS

Students from disadvantaged backgrounds (other than those with special needs)
The national authorities together with the National Agencies responsible for the implementation of Erasmus+ in a given Programme Country may decide (based on an opt-in/opt-out option, depending on the support already provided at national level) that all the HEIs in their country should top up the individual support from their EU grant to students from disadvantaged backgrounds (including refugees, asylum seekers and migrants), with a single amount of **between 100 and 200 EUR per month**. The precise single monthly amount and the criteria to be applied would be defined at national level by the national authorities.

Students in traineeships
Students carrying out traineeships will receive an additional top-up from the EU grant with an amount **between 100 and 200 EUR per month**. The precise level will be determined by National Agencies and/or higher education institutions according to the level of demand and level of co-financing for this type of mobility. In all cases, the same level should be given to all students within the same higher education institution, independently from any top-up and/or contribution in kind that the student may receive from the host enterprise. Students from disadvantaged backgrounds who take part in traineeships are entitled to receive the top-up for students from disadvantaged backgrounds instead of the top-up for traineeships, in case the top-up for traineeships is lower.

Students from outermost Programme Countries and regions and OCTs
Considering the constraints imposed by the remoteness from other Programme Countries, students from outermost regions, Cyprus, Iceland, Malta and Overseas Countries and Territories (OCTs) will receive the following higher amounts for individual support:

| From | To | Amount |
|---|---|---|
| Outermost regions, Cyprus, Iceland and Malta, Overseas Countries and Territories | Group 1 countries | 770 EUR per month |
| | Group 2 countries | 720 EUR per month |
| | Group 3 countries | 670 EUR per month |

In addition to the above-mentioned amounts for individual support, students from these countries will receive the following top-up amounts, to support them in covering their travel costs:

| Travel distances[31] | Amount |
|---|---|
| Between 10 and 99 KM: | 20 EUR per participant |
| Between 100 and 499 KM: | 180 EUR per participant |
| Between 500 and 1999 KM: | 275 EUR per participant |
| Between 2000 and 2999 KM: | 360 EUR per participant |
| Between 3000 and 3999 KM: | 530 EUR per participant |
| Between 4000 and 7999 KM: | 820 EUR per participant |
| 8000 KM or more: | 1500 EUR per participant |

Top-ups for traineeships or disadvantaged backgrounds would not apply in this case.

Level of financial support defined by higher education institutions
In all cases, higher education institutions will be required to respect the following principles and criteria when defining and/or applying the EU rates within their institution:

- Once the rates have been defined by the institutions, they shall remain the same throughout the duration of the mobility project. It is not possible to decrease or increase the level of grants within the same project.
- The rates must be defined and/or applied in an objective and transparent manner, taking into account all the principles and the methodology described above (i.e. considering the mobility flow as well as the additional specific funding);
- The same level of grant must be given to all students going to the same group of countries for the same type of mobility – studies or traineeships (except for students from disadvantaged backgrounds or with special needs).

#### MOBILITY BETWEEN PROGRAMME AND PARTNER COUNTRIES

The amounts for individual support are set as follows:

| From | To | Amount |
|---|---|---|
| Eligible Partner Countries | Group 1 Programme Countries | 900 EUR per month |
| | Group 2 Programme Countries | 850 EUR per month |
| | Group 3 Programme Countries | 800 EUR per month |
| Programme Countries | Partner Countries | 700 EUR per month |

In addition, students going to/coming from Partner Countries will receive the following top-up amounts, to support them in covering their travel costs:

| Travel distances[32] | Amount |
|---|---|
| Between 10 and 99 KM: | 20 EUR per participant |
| Between 100 and 499 KM: | 180 EUR per participant |
| Between 500 and 1999 KM: | 275 EUR per participant |
| Between 2000 and 2999 KM: | 360 EUR per participant |
| Between 3000 and 3999 KM: | 530 EUR per participant |
| Between 4000 and 7999 KM: | 820 EUR per participant |
| 8000 KM or more: | 1500 EUR per participant |

[31] Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission (http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm). The distance of a one-way travel must be used to calculate the amount of the EU grant that will support the round trip.
[32] Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission (http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm). The distance of a one-way travel must be used to calculate the amount of the EU grant that will support the round trip.

### C) GRANT SUPPORT FOR THE MOBILITY OF STAFF

Staff will receive an EU grant as a contribution to their costs for travel and subsistence during the period abroad as follows:

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, from their place of origin to the venue of the activity and return | Contribution to unit costs | For travel distances between 10 and 99KM:<br>20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[33]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[34] |
| | | | For travel distances between 100 and 499 KM:<br>180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM:<br>275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM:<br>360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM:<br>530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM:<br>820 EUR per participant | |
| | | | For travel distances of 8000 KM or more:<br>1500 EUR per participant | |
| **Individual support** | Costs directly linked to the subsistence of participants during the activity | Contribution to unit costs | up to the 14th day of activity: A1.1, if mobility between Programme Countries or A1.2 if mobility between Programme and Partner Countries, per day per participant<br>+<br>between the 15th and 60th day of activity: 70% of A1.1, if mobility between Programme Countries or A1.2 if mobility between Programme and Partner Countries, per day per participant | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity). |

[33] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[34] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band (i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

**TABLE A – INDIVIDUAL SUPPORT (AMOUNTS IN EURO PER DAY)**

The amounts depend on the receiving country. These amounts will be set within the minimum and maximum ranges provided in the table below. When defining the amounts to be applied by beneficiaries in their country, National Agencies, in agreement with National Authorities, will consider two specific criteria:

- the availability and the level of other sources of co-financing from private or public bodies at local, regional or national level to complement the EU grant;
- the general level of demand of staff who intend to teach or receive training abroad.

The same percentage within the range should be applied to all destination countries. It is not possible to give the same amount for all destination countries.

| Receiving country | Staff from Programme Countries | Staff from Partner Countries |
|---|---|---|
| | Min-Max (per day) | Amount (per day) |
| | A1.1 | A1.2 |
| **Norway, Denmark, Luxembourg, United Kingdom, Iceland, Sweden, Ireland, Finland, Liechtenstein** | 80-180 | 180 |
| **Netherlands, Austria, Belgium, France, Germany, Italy, Spain, Cyprus, Greece, Malta, Portugal** | 70-160 | 160 |
| **Slovenia, Estonia, Latvia, Croatia, Slovakia, Czech Republic, Lithuania, Turkey, Hungary, Poland, Romania, Bulgaria, the Former Yugoslav Republic of Macedonia** | 60-140 | 140 |
| **Partner Countries** | 180 | Not eligible |

For mobility activities between Programme Countries, National Agencies may decide to grant flexibility to their higher education institutions by fixing ranges instead of amounts at national level. This should be based on justified grounds, for example in countries where co-financing is available at regional or institutional level. The exact amounts will be published on the website of each National Agency and higher education institutions.

## MOBILITY PROJECT FOR VET LEARNERS AND STAFF

Organisations may apply for a VET learners and staff mobility projects in two ways:

- Any eligible organisation may apply for funding for Mobility projects for VET learners and staff **without** the Erasmus+ VET Mobility Charter
- Organisation with a proven track record holding a valid **Erasmus+ VET Mobility Charter** may use a fast-track procedure to apply for funding for Mobility projects for VET learners and staff **with** the Erasmus+ VET Mobility Charter

The eligibility and award criteria for these two application modalities are described in the relevant sections of this Action.

### ERASMUSPRO: SUPPORT FOR LONG-TERM MOBILITY OF VET LEARNERS OR RECENT GRADUATES

In December 2016, the Communication "Investing in Europe's Youth" launched "ErasmusPro", a policy initiative aimed at increasing long-term mobility abroad, for Vocational Education and Training learners, including apprentices or recent graduates. ErasmusPro responds to calls by the European Parliament, as well as companies, and other VET stakeholders, to increase the quality, the attractiveness, and the employability of VET learners through long-term work-placements abroad.

VET mobility has a clear value in helping young people open up their minds, widen their social, professional and transversal skills, develop a taste for innovation and initiative and a sense of European citizenship. It is a means to improve the overall performance of the organisations (both VET providers and companies) involved in such practices, by developing sustained internationalisation strategies, while also helping business find the right skills they need to increase their competitiveness. Long-term placements abroad have a higher added value for learners in terms of developing job specific skills and an even better acquaintance with the foreign language, culture and work environment, thus boosting their employability.

A VET mobility project can comprise one or more of the following activities:

**Learners' mobility:**

- **Mobility in VET providers and/or companies abroad,** from 2 weeks to less than 3 months;
- **Long-term mobility in VET providers and/or companies abroad (ErasmusPro),** from 3 to 12 months.

These activities are open to VET learners (including apprentices) in vocational training organisations (VET providers). To strengthen the employability of VET learners and to facilitate their transition to the labour market, recent graduates (less than 12 months after graduation), can also participate in these activities35. Activities can take the form of full work placements with learners hosted in a company or other relevant organisation, or at a VET provider (a school, institute or other organisation providing vocational education and training) offering a combination of school based learning and a strong work-based component (work placements). In the case of long-term mobilities (ErasmusPRO), while the host body can be a VET provider, the activity should have a clear work-based learning component – usually in the form of a work placement in a company.

Each mobility activity is set within a quality framework previously agreed upon by the sending and receiving organisations to ensure a high level of quality for the activity, including a "Learning Agreement".

The learning outcomes are formally recognised and validated at an institutional level, course contents are adapted as necessary to ensure that the mobility period abroad is well fitted to the course in which the apprentice/VET learner is enrolled.

In the framework of ErasmusPro activities, short "Advance Planning Visits" (APV) of staff from sending to hosting organisations (VET providers and/or companies) may be funded in order to facilitate interinstitutional cooperation, better prepare the mobilities and ensure their high quality.

**Staff mobility:**

- **Teaching/training assignments**: this activity allows staff of VET providers to teach at a partner VET provider abroad. It also allows staff of companies to provide training at a VET provider abroad.
- **Staff training:** this activity supports the professional development of VET staff in the form of a work placement or a job shadowing/observation period abroad in a company or any other VET provider.

Erasmus+ supports learning mobility of staff that:

- is framed into a strategic approach of the participating organisations (aimed at modernising and internationalising their mission);
- responds to clearly identified staff development needs and is accompanied by appropriate selection, preparation and follow-up measures;
- ensures that the learning outcomes of participating staff are properly recognised and ensures that the learning outcomes are disseminated and widely used within the organisation.

These activities are also an opportunity for VET staff to gain competences in addressing the needs of learners with disadvantaged backgrounds. Given the current context concerning young migrants, refugees and asylum seekers, particular attention will be also given to support projects that train VET staff in such areas as training refugee children, intercultural classrooms, teaching youngsters in their second language, classroom tolerance and diversity.

### WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN THIS PROJECT?

Participating organisations involved in the mobility project assume the following roles and tasks:

- Applicant organisation: in charge of applying for the mobility project, signing and managing the grant agreement and reporting. The applicant can be a consortium coordinator: leading a national mobility consortium of partner organisations of the same country aimed at sending VET learners and staff to activities abroad. The national mobility consortium coordinator can also – but not necessarily – act as sending organisation.
- Sending organisation: in charge of selecting VET learners/staff and sending them abroad.
- Receiving organisation: in charge of receiving foreign VET learners/staff and offering them a programme of activities, or benefiting from a training activity provided by VET staff.
- Intermediary organisation: this is an organisation active in the labour market or in the fields of education, training and youth which is not a sending organisation, but whose expertise allows it to assist the sending VET providers with administrative procedures, practical arrangements, matching apprentice/learner profiles with the needs of companies in case of traineeships, and preparing the participants. If the intermediary organisation is a partner in a national mobility consortium, its contribution must be clearly described as part of the project application. In case the intermediary organisation is not a part of a national mobility consortium, applicant organisations are strongly advised to formally define a set of rights and obligations when cooperating with such intermediary organisations.

The sending and receiving organisations, together with the learners/staff, must have agreed on the activities to be undertaken by the learners - in a 'Learning Agreement' - or by staff members - in a 'Mobility Agreement' - prior to the start of the mobility period. These agreements define the target learning outcomes for the learning period abroad, specify the formal recognition provisions and list the rights and obligations of each party.

VET learners going on mobility for 19 days or longer are eligible to receive a linguistic support. Online linguistic support is being gradually implemented in the course of the Programme. It is made available by the European Commission to eligible participants to assess their foreign language competences and to offer, where necessary, the most appropriate language learning before and/or during mobility (for more details, see Annex I of this Guide).

## MOBILITY PROJECT FOR VET LEARNERS AND STAFF WITHOUT THE ERASMUS+ VET MOBILITY CHARTER

### WHAT ARE THE CRITERIA USED TO ASSESS THIS PROJECT?

Here below are listed the formal criteria that a VET mobility project must respect in order to be eligible for an Erasmus+ grant:

#### GENERAL ELIGIBILITY CRITERIA

| | |
|---|---|
| **Eligible activities** | A VET mobility project must comprise one or more of the following activities:<br>▪ Mobility in VET providers and/or companies abroad, from 2 weeks to less than 3 months;<br>▪ Long-term mobility in VET providers and/or companies abroad (ErasmusPro), from 3 to 12 months.<br>▪ Teaching/training assignments abroad;<br>▪ Staff training abroad. |

| | |
|---|---|
| **Eligible participating organisations** | A participating organisation can be:<br>▪ any public or private organisation (or its subsidiary/branch) active in the field of vocational education and training (referred to as a VET provider); or<br>▪ any public or private organisation active in the labour market (referred to as a company)<br>For example, such organisations can be:<br>– a vocational education school/institute/centre;<br>– a public or private, a small, medium or large enterprise (including social enterprises);<br>– a social partner or other representative of working life, including chambers of commerce, craft/professional associations and trade unions;<br>– a public body at local, regional or national level;<br>– a research institute;<br>– a foundation;<br>– a school/institute/educational centre (at any level, from pre-school to upper secondary education, and including adult education);<br>– a non-profit organisation, association, NGO;<br>– a body providing career guidance, professional counselling and information services;<br>– a body responsible for policies in the field of vocational education and training.<br>Each organisation must be established in a Programme Country. |
| **Who can apply?** | ▪ A VET provider (or its subsidiary/branch) sending learners and staff abroad;<br>▪ The coordinator of a national mobility consortium.<br>Individuals cannot apply directly for a grant. |
| **Number of participating organisations** | A mobility activity is transnational and involves minimum two participating organisations (at least one sending and at least one receiving organisation) from different Programme Countries.<br>In the case of projects presented by a national mobility consortium, all members of the consortium must be from the same Programme Country and need to be identified at the time of applying for a grant. A consortium must comprise at least 3 VET providers. |
| **Duration of project** | 1 to 2 years. The applicant must choose the duration at application stage, based on the objective of the project and on the type of activities planned. |
| **Where to apply?** | To the National Agency of the country in which the applicant organisation is established. |
| **When to apply?** | Applicants have to submit their grant application by **1 February at 12:00 (midday Brussels time)** for projects starting between 1 June and 31 December of the same year.<br>**Possible additional deadline:**<br>National Agencies may organise a second round of applications if funds remain unused, for which the rules set out in this Guide will also apply. National Agencies will inform of this possibility via their website.<br>If a second round is organised, applicants have to submit their grant application by **4 October at 12:00 (midday Brussels time)** for projects starting between 1 January and 31 May of the following year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |
| **Other criteria** | A VET provider (or its subsidiary/branch) or national mobility consortium can apply only once per selection round. However, a VET provider may be part of or coordinate several different national mobility consortia applying at the same time. |

**ADDITIONAL ELIGIBILITY CRITERIA FOR LEARNERS MOBILITY**

| | |
|---|---|
| **Duration of activity** | ▪ Mobility in VET providers and/or companies abroad, from 2 weeks to less than 3 months, excluding travel time;<br>▪ Long-term mobility in VET providers and/or companies abroad (ErasmusPro), from 3 to 12 months, excluding travel time. |
| **Venue(s) of the activity** | Participants must carry out their mobility activity abroad, in another Programme Country. |
| **Eligible participants** | VET learners (including apprentices) whose studies typically include work-based learning, resident in the country of the sending organisation. Persons accompanying VET learners abroad.<br>Recent graduates of a VET provider (including former apprentices) may also participate in the activity. Recent graduates must undertake their training placement abroad within 12 months after their graduation. For those countries where recent graduates must enrol in obligatory military or civil service after graduation, the period of eligibility for recent graduates will be extended by the duration of that service. |
| **Other criteria** | **Advance Planning Visit (APV)**<br>For projects including ErasmusPro activities, the applicant may request Advance Planning Visits (APV) carried out by staff involved in the organisation of the ErasmusPro activities and in a working relation with the sending organisation or consortium member (such as teachers, trainers, international mobility officers, etc.).<br>Within the framework of an APV, the following eligibility criteria must be respected:<br>• duration: maximum 3 working days, excluding travel time;<br>• each APV is limited to one participant;<br>• only one APV may be carried out per hosting organisation |

**ADDITIONAL ELIGIBILITY CRITERIA FOR STAFF MOBILITY**

| | |
|---|---|
| **Duration of activity** | From 2 days to 2 months, excluding travel time.<br>The minimum 2 days must be consecutive. |
| **Venue(s) of the activity** | Participants must carry out their mobility activity abroad, in another Programme Country. |
| **Eligible participants** | Staff in charge of VET (such as teachers, trainers, international mobility officers, staff with administrative or guidance functions, etc.) in a working relation with the sending organisation(s), as well as other staff involved in the strategic development of the organisation.<br>In case of teaching/training assignments, the Action is also open to persons from companies, public sector and/or civil society organisations.<br>In addition, for teacher/training assignments, the action is open to trainers from companies in another Programme Country who have been invited to teach at the applicant VET providers and /or in the organisations of the consortium where relevant. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

**AWARD CRITERIA**

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives of the Action (see section "What are the aims of a mobility project");<br>- the needs and objectives of the participating organisations and of the individual participants, particularly taking into account what is specified in the European Development Plan.<br>▪ The extent to which the proposal integrates long-term mobility (ErasmusPro).<br>▪ The extent to which the proposal is suitable to:<br>- producing high-quality learning outcomes for participants;<br>- reinforcing the capacities and international scope of the participating organisations. |
| **Quality of the project design and implementation (maximum 40 points)** | ▪ The clarity, completeness and quality of all the phases of the project proposal (preparation, implementation of mobility activities, and follow-up);<br>▪ The clarity of planning and feasibility of implementation of long-term mobility (ErasmusPro), if applicable<br>▪ The consistency between project objectives and activities proposed;<br>▪ The Quality of the European Development Plan of the applicant organisation;<br>▪ The quality of the practical arrangements, management and support modalities;<br>▪ The quality of the preparation provided to participants;<br>▪ The quality of arrangements for the recognition and validation of participants' learning outcomes as well as the consistent use of European transparency and recognition tools;<br>▪ The appropriateness of measures for selecting and/or involving participants in the mobility activities;<br>▪ If applicable, the quality of cooperation and communication between the participating organisations, as well as with other relevant stakeholders. |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the project;<br>▪ The potential impact of the project:<br>- on participants and participating organisations during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the project within and outside the participating organisations.<br>▪ The extent to which the project promotes long-term mobility (ErasmusPro) by developing sustainable cross-border cooperation and recognition structures, if applicable. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 15 points for the categories "relevance of the project" and "impact and dissemination"; 20 points for the category "quality of the project design and implementation").

**GRANT AWARD**

The maximum grant amount awarded for selected projects will depend on a number of elements:

- the number and duration of mobility periods applied for;
- the extent to which the proposal integrates long-term mobility from 3 to 12 months duration (ErasmusPro);
- the past performance of the applicant in terms of number of mobility periods, good quality in the implementation of activities and sound financial management, in case the applicant has received a similar grant in previous years;
- the total national budget allocated for the mobility Action.

### WHAT ELSE YOU SHOULD KNOW ABOUT THIS ACTION?

#### PARTICIPANTS IN MOBILITY ACTIVITIES

Applicants of mobility projects will be allowed to claim financial support for travel costs of participants under the budget heading "exceptional costs" (up to a maximum of 80% of total eligible costs: see "What are the funding rules?"). This would be allowed provided that applicants can justify that the standard funding rules (based on contribution to unit costs per travel distance band) do not cover at least 70% of the travel costs of participants.

#### OTHER INFORMATION

More compulsory criteria and additional useful information relating to this Action can be found in Annex I of this Guide. Interested organisations are invited to read carefully the relevant sections of this Annex before applying for financial support.

## MOBILITY PROJECT FOR VET LEARNERS AND STAFF WITH THE ERASMUS+ VET MOBILITY CHARTER

### WHAT ARE THE CRITERIA USED TO ASSESS THIS PROJECT?

Here below are listed the formal criteria that a VET mobility project with an Erasmus+ VET Mobility Charter must respect in order to be eligible for an Erasmus+ grant:

#### GENERAL ELIGIBILITY CRITERIA

| | |
|---|---|
| **Who can apply?** | Individual organisations or consortia, established in a Programme Country, that are holders of the Erasmus+ VET Mobility Charter[35]. |
| **Eligible activities** | A VET mobility project must comprise one or more of the following activities:<br>▪ Mobility in VET providers and companies abroad, from 2 weeks to less than 3 months;<br>▪ Long-term mobility in VET providers and companies abroad, from 3 to 12 months (ErasmusPro).<br>▪ Teaching/training assignments abroad;<br>▪ Staff training abroad. |
| **Number of participating organisations** | A mobility activity is transnational and involves a minimum of two participating organisations (at least one sending and one receiving organisation) from different Programme Countries.<br>In case of projects from national mobility consortia holding an Erasmus+ VET Mobility Charter, the sending and receiving organisations must be from different Programme Countries. |
| **Duration of project** | 1 to 2 years. The applicant must choose the duration at application stage. |
| **Where to apply?** | To the National Agency of the country in which the applicant organisation is established. |
| **When to apply?** | Applicants have to submit their grant application by **1 February at 12:00 (midday Brussels time)** for projects starting between 1 June and 31 December of the same year.<br><br>**Possible additional deadline:**<br>National Agencies may organise a second round of applications if funds remain unused, for which the rules set out in this Guide will also apply. National Agencies will inform of this possibility via their website.<br>If a second round is organised, applicants have to submit their grant application by **4 October at 12:00 (midday Brussels time)** for projects starting between 1 January and 31 May of the following year. |
| **How to apply?** | Please see part C of this Guide for details on how to apply. |
| **Other criteria** | A VET provider or national mobility consortium can apply only once per selection round. However, a VET provider may be part of or coordinate several different national mobility consortia applying at the same time. |

[35] For more information on the Charter, see the section "The Erasmus+ VET Mobility Charter" and the Annex I of this Guide.

**ADDITIONAL ELIGIBILITY CRITERIA FOR LEARNERS MOBILITY**

| | |
|---|---|
| **Duration of activity** | ▪ Mobility in VET providers and/or companies abroad, from 2 weeks to less than 3 months, excluding travel time;<br>▪ Long term mobility in VET providers and/or companies abroad (ErasmusPro), from 3 to 12 months, excluding travel time. |
| **Venue(s) of the activity** | Participants must carry out their mobility activity abroad, in another Programme Country. |
| **Eligible participants** | VET learners (including apprentices) whose studies typically include work-based learning, resident in the country of the sending organisation. Persons accompanying VET learners abroad.<br>Recent graduates of a VET provider (including former apprentices) may also participate in the activity. Recent graduates must undertake their training placement abroad within 12 months after their graduation. For those countries where recent graduates must enrol in obligatory military or civil service after graduation, the period of eligibility for recent graduates will be extended by the duration of that service. |
| **Other criteria** | **Advance Planning Visit (APV)**<br>For projects including ErasmusPro activities, the applicant may request Advance Planning Visits (APV) carried out by staff involved in the organisation of the ErasmusPro activities and in a working relation with the sending organisation or consortium member (such as teachers, trainers, international mobility officers, etc.).<br>Within the framework of an APV, the following eligibility criteria must be respected:<br>• duration: maximum 3 working days, excluding travel time;<br>• each APV is limited to one participant;<br>• only one APV may be carried out per hosting organisation |

**ADDITIONAL ELIGIBILITY CRITERIA FOR STAFF MOBILITY**

| | |
|---|---|
| **Duration of activity** | From 2 days to 2 months, excluding travel time.<br>The minimum 2 days must be consecutive. |
| **Venue(s) of the activity** | Participants must carry out their mobility activity abroad, in another Programme Country. |
| **Eligible participants** | Staff in charge of VET (such as teachers, trainers, international mobility officers, staff with administrative or guidance functions, etc.) in a working relation with the sending organisation(s), as well as other staff involved in the strategic development of the organisation.<br>In case of teaching/training assignments, the Action is also open to persons from companies, public sector and/or civil society organisations.<br>In addition, for teacher/training assignments, the action is open to trainers from companies in another Programme Country who have been invited to teach at the applicant VET providers and /or in the organisations of the consortium where relevant |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult **Part C of this Guide**.

**AWARD CRITERIA FOR APPLICATIONS FROM VET MOBILITY CHARTER HOLDERS**

There is no qualitative assessment (the quality has been assessed at the stage of the application for the VET Mobility Charter itself) and therefore there are no award criteria.

Any eligible grant application (after having passed the eligibility check) will get funding.

The maximum grant amount awarded will depend on a number of elements:
- the number of mobility periods and months/days applied for;
- the extent to which the proposal integrates long-term mobility from 3 to 12 months duration (ErasmusPro);

- the past performance of the applicant in terms of number of mobility periods, good quality in the implementation of activities and sound financial management, in case the applicant has received a similar grant in previous years;
- the total national budget allocated for the mobility Action.

### WHAT ACCREDITATION DO APPLICANTS NEED FOR THIS MOBILITY PROJECT?

#### THE ERASMUS+ VET MOBILITY CHARTER

The Erasmus+ VET Mobility Charter aims to improve European internationalisation strategies in the field of VET and to make them more sustainable, thus enhancing the quality and quantity of transnational VET mobility. Calls for awarding the VET Mobility Charter are published annually on National Agencies' websites.

The acquirement of a VET Mobility Charter gives the VET Mobility Charter holders the possibility to apply in a simplified way under the Erasmus+ Key Action 1 mobility for VET learners and staff.

### WHAT ELSE YOU SHOULD KNOW ABOUT THIS ACTION?

#### EXCEPTIONAL COSTS

Beneficiaries of mobility projects will be allowed to claim financial support for exceptional travel costs of participants under the budget heading "exceptional costs" (up to a maximum of 80% of travel costs. This would be allowed provided that applicants can justify that the standard funding rules (based on unit costs per travel distance band) do not cover at least 70% of the travel costs of participants.

#### OTHER INFORMATION

More compulsory criteria and additional useful information relating to this Action can be found in Annex I of this Guide. Interested organisations are invited to read carefully the relevant sections of this Annex before applying for financial support.

**WHAT ARE THE FUNDING RULES?**

The budget of the mobility project must be drafted according to the following funding rules (in euro):

**A) FUNDING RULES APPLYING TO ALL MOBILITY ACTIVITIES**

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return.<br><br>In the framework of ErasmusPro activities, travel costs for an Advance Planning Visit, if applicable. | Contribution to unit costs | For travel distances between 10 and 99KM:<br>20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[36]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[37]. |
| | | | For travel distances between 100 and 499 KM:<br>180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM:<br>275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM:<br>360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM:<br>530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM:<br>820 EUR per participant | |
| | | | For travel distances of 8000 KM or more:<br>1500 EUR per participant | |
| **Organisational Support** | Costs directly linked to the implementation of mobility activities (excluding subsistence for participants), including preparation (pedagogical, intercultural, linguistic), monitoring and support of participants during mobility, validation of learning outcomes, dissemination activities. | Contribution to unit costs | up to the 100th participant: 350 EUR per participant<br>+<br>beyond the 100th participant: 200 EUR per additional participant | Based on the number of participants |
| **Special needs support** | Additional costs directly related to participants with disabilities and accompanying persons (including costs related to travel and subsistence, if justified and as long as a grant for these participants is not requested through budget categories "travel" and "individual support"). | Real costs | Up to 100% of eligible costs | Conditional: the request for financial support to cover special needs support must be motivated in the application form |

[36] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[37] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

| | | | | |
|---|---|---|---|---|
| **Exceptional costs** | Additional costs to support the participation of learners with fewer opportunities (excluding costs for travel and individual support for participants and accompanying persons).<br>Costs for providing a financial guarantee, if the National Agency asks for it.<br><br>Expensive travel costs of participants (for details, see section "what else you should know about this action"). | Real costs | Costs for financial guarantee: 75% of eligible costs<br>Other costs: 100% of eligible costs<br><br>Expensive travel costs: maximum up to 80% of eligible costs | Conditional: the request for financial support to cover exceptional costs must be motivated in the application form. |

**B) ADDITIONAL FUNDING APPLYING TO MOBILITY OF VET LEARNERS**

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Individual support** | Costs directly linked to the subsistence of participants, including accompanying persons, during the activity. | Contribution to unit costs | up to the 14th day of activity: A2.1 per day per participant<br>+<br>between the 15th day of activity and up to 12 months: 70% of A2.1 per day per participant[38] | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity. |
| | In the framework of ErasmusPro activities, costs connected to the subsistence of staff participating in an Advance Planning Visit, if applicable. | | A2.2 per day per participant | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity. |
| **Linguistic support** | Costs linked to the support offered to participants - prior to departure or during the activity – in order to improve the knowledge of the language they will use to study or receive training during their activity. | Contribution to unit costs | Only for activities lasting between 19 days and 12 months:<br>150 EUR per participant needing linguistic support | Conditional: applicants must request the support in the instruction language of the activity, on the basis of participants' needs for languages not offered by the Erasmus+ Online Linguistic |

[38] In case of accompanying persons, the rates for VET staff apply. See budget heading "Individual support" in the section C) Additional funding applying to mobility of VET staff. In exceptional cases, where the accompanying person needs to stay abroad for more than 60 days, extra subsistence costs beyond the 60th date will be supported under the budget heading "Special needs support".

| | | | | |
|---|---|---|---|---|
| | | | | Support. |

**C) ADDITIONAL FUNDING APPLYING TO MOBILITY OF VET STAFF**

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Individual support** | Costs directly linked to the subsistence of participants, including accompanying persons. | Contribution to unit costs | up to the 14th day of activity: A2.2 per day per participant<br>+<br>between the 15 th and 60 th day of activity: 70% of A2.2 per day per participant | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity. |

**TABLE 1 – INDIVIDUAL SUPPORT (AMOUNTS IN EURO PER DAY)**

The amounts depend on the country where the activity takes place. Each National Agency will define - on the basis of objective and transparent criteria - the amounts applicable to projects submitted in their country. These amounts will be set within the minimum and maximum ranges provided in the table below. The exact amounts will be published on the website of each National Agency.

| Receiving country | Learners mobility | Staff mobility |
|---|---|---|
| | Min-Max (per day) | Min-Max (per day) |
| | A2.1 | A2.2 |
| **Norway, Denmark, Luxembourg, United Kingdom, Iceland, Sweden, Ireland, Finland, Liechtenstein** | 30-120 | 80-180 |
| **Netherlands, Austria, Belgium, France, Germany, Italy, Spain, Cyprus, Greece, Malta, Portugal** | 26-104 | 70-160 |
| **Slovenia, Estonia, Latvia, Croatia, Slovakia, Czech Republic, Lithuania, Turkey, Hungary, Poland, Romania, Bulgaria, the Former Yugoslav Republic of Macedonia** | 22-88 | 60-140 |

## MOBILITY PROJECT FOR SCHOOL EDUCATION STAFF

This mobility project can comprise one or more of the following activities:

**Staff mobility:**

- **teaching assignments**: this activity allows teachers or other school education staff to teach at a partner school abroad;
- **structured courses or training events abroad:** support the professional development of teachers, school leaders or other educational staff;
- **job shadowing:** provides an opportunity for teachers, school leaders or other school staff to spend a period abroad in a partner school or another relevant organisation active in the field of school education.

These activities are also an opportunity for teachers to gain competences in addressing the needs of pupils with disadvantaged backgrounds. Given the current context concerning young migrants, refugees and asylum seekers, particular attention will be also given to support projects that train teachers in such areas as training refugee children, intercultural classrooms, teaching pupils in their second language, classroom tolerance and diversity.

### WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN THIS PROJECT?

Participating organisations involved in the mobility project assume the following roles and tasks:

- Applicant organisation: in charge of applying for the mobility project, signing and managing the grant agreement and reporting. If the applicant organisation is a school, it also acts as sending organisation. The applicant can be a consortium coordinator: leading a national mobility consortium of partner organisations of the same country aimed at sending school education staff to activities abroad.
- Sending organisation: in charge of selecting teachers and other school education staff and sending them abroad.
- Receiving organisation: in charge of receiving teachers and other school education staff and offering them a programme of activities, or benefiting from a teaching activity provided by them.

The specific role of the receiving organisation depends on the type of activity and the relationship with the sending organisation. The receiving organisation may be:

- a course provider (in the case of participation in a structured course or training event);
- a partner school or other relevant organisation (in the case of e.g. job shadowing or teaching assignments). In this case, the sending and receiving organisations, together with the participants, should establish an agreement before the start of the activity. This agreement should define the objectives and activities for the period abroad, and specify the rights and obligations of each party.

Erasmus+ supports learning mobility of staff that:

- is framed within a European Development Plan for the sending organisation (aimed at modernising and internationalising their mission);
- responds to clearly identified staff development needs;
- is accompanied by appropriate selection, preparation and follow-up measures;
- ensures that the learning outcomes of participating staff are properly recognised;
- ensures that the learning outcomes are disseminated and widely used within the organisation.

### WHAT ARE THE CRITERIA USED TO ASSESS THIS PROJECT?

Here below are listed the formal criteria that a school education mobility project must respect in order to be eligible for an Erasmus+ grant:

**ELIGIBILITY CRITERIA**

| | |
|---|---|
| **Eligible activities** | A school mobility project must comprise one or more of the following activities:<br>▪ teaching assignments;<br>▪ structured courses or training events abroad;<br>▪ job shadowing |
| **Eligible participating organisations** | ▪ **Teaching assignments:**<br>The sending and receiving organisations must be schools (i.e. institutions providing general, vocational, or technical education on any level from pre-school to upper secondary education)[39].<br>▪ **Staff training:**<br>The sending organisation must be a school.<br>The receiving organisation can be:<br>o a school; or<br>o any public or private organisation active in the labour market or in the fields of education, training and youth. For example, such organisation can be:<br>– a VET or adult education school/institute/educational centre;<br>– a higher education institution;<br>– a public or private small, medium or large enterprise (including social enterprises);<br>– a social partner or other representative of working life, including chambers of commerce, craft/professional associations and trade unions;<br>– a public body at local, regional or national level;<br>– a non-profit organisation, association, NGO;<br>– a research institute;<br>– a foundation;<br>– a body providing career guidance, professional counselling and information services;<br>– an organisation providing courses or training.<br>For applications presented by a national mobility consortium:<br>The coordinating organisation can be:<br>o a local or regional school authority; or<br>o school coordination body[40]<br>The other organisations involved in the national consortium must be schools.<br>Each participating organisation must be established in a Programme Country. |
| **Who can apply?** | ▪ A school sending its staff abroad (individual application);<br>▪ The coordinator of a national mobility consortium (consortium application)<br>Individuals cannot apply directly for a grant. |
| **Number of participating organisations** | A mobility activity is transnational and involves minimum two participating organisations (at least one sending and at least one receiving organisation) from different countries. Receiving organisations do not need to be identified at the time of applying for a grant.<br>In the case of projects presented by a national mobility consortium, all members of the consortium must be from the same Programme Country and need to be identified at the time of applying for a grant. A consortium must comprise at least 3 organisations (the coordinator and at least two schools). The schools in the consortium must have an organisational link to the organisation acting as consortium coordinator. |
| **Duration of project** | 1 to 2 years. The applicant must choose the duration at application stage, based on the objective of the project and on the type of activities planned over time. |
| **Duration of activity** | From 2 days to 2 months, excluding travel time.<br>The minimum 2 days must be consecutive. |
| **Venue(s) of the activity** | Mobility Activities must be carried out abroad, in another Programme Country. |

[39] Please refer to the list of eligible schools in each country. For more information, contact the National Agency in the country.
[40] Please refer to the list of eligible organisations in each country. For more information, contact the National Agency in the country.

| | |
|---|---|
| **Eligible participants** | Staff in charge of school education (teaching and non-teaching, including school managers, heads, etc.), in a working relation with the sending school(s) as well as other educational staff (school inspectors, school counsellors, pedagogical advisors, phychologists, etc.) involved in the strategic development of the sending school(s). |
| **Where to apply?** | To the National Agency of the country in which the applicant organisation is established[41]. |
| **When to apply?** | Applicants have to submit their grant application by **1 February at 12:00 (midday Brussels time)** for projects starting between 1 June and 31 December of the same year.<br><br>**Possible additional deadline:**<br>National Agencies may organise a second round of applications if funds remain unused, for which the rules set out in this Guide will also apply. National Agencies will inform of this possibility via their website.<br><br>If a second round is organised, applicants have to submit their grant application by **4 October at 12:00 (midday Brussels time)** for projects starting between 1 January and 31 May of the following year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |
| **Other criteria** | An organisation or national mobility consortium can apply only once per selection round. However, an organisation may be part of or coordinate several different national mobility consortia applying at the same time. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

**AWARD CRITERIA**

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives of the Action (see section "What are the aims of a mobility project");<br>- the needs and objectives of the participating organisations and of the individual participants as specified in the European Development Plan.<br>▪ The extent to which the proposal is suitable for:<br>- producing high-quality learning outcomes for participants;<br>- reinforcing the capacities and international scope of the participating organisations. |

[41] Please note: schools under the supervision of national authorities of another country (e.g. lycée français, German schools, UK "Forces" schools) apply to the NA of the supervising country.

| | |
|---|---|
| **Quality of the project design and implementation (maximum 40 points)** | ▪ The clarity, completeness and quality of all the phases of the project proposal (preparation, implementation of mobility activities and follow-up);<br>▪ The consistency between project objectives and proposed activities ;<br>▪ The quality of the European Development Plan of the applicant organisation;<br>▪ The appropriateness of measures for selecting and/or involving participants in the mobility activities;<br>▪ The quality of the practical arrangements, management and support modalities;<br>▪ The quality of the preparation provided to participants;<br>▪ The quality of arrangements for the recognition and validation of participants' learning outcomes, as well as the consistent use of European transparency and recognition tools. |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the project;<br>▪ The potential impact of the project:<br>- on individual participants and on the participating organisations during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the project within and outside the participating organisations. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 15 points for the categories "relevance of the project" and "impact and dissemination"; 20 points for the category "quality of the project design and implementation").

## WHAT ELSE SHOULD YOU KNOW ABOUT THIS ACTION?

#### EXCEPTIONAL COSTS

Beneficiaries of mobility projects will be allowed to claim financial support for exceptional travel costs of participants under the budget heading "exceptional costs" (up to a maximum of 80% of travel costs. This would be allowed provided that applicants can justify that the standard funding rules (based on unit costs per travel distance band) do not cover at least 70% of the travel costs of participants.

#### OTHER INFORMATION

More compulsory criteria and additional useful information relating to this Action can be found in Annex I of this Guide. Interested organisations are invited to read carefully the relevant sections of this Annex before applying for financial support.

## WHAT ARE THE FUNDING RULES?

The budget of the mobility project must be drafted according to the following funding rules (in euro):

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return | Contribution to unit costs | For travel distances between 10 and 99KM:<br>20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[42]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[43]. |
| | | | For travel distances between 100 and 499 KM:<br>180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM:<br>275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM:<br>360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM:<br>530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM:<br>820 EUR per participant | |
| | | | For travel distances of 8000 KM or more:<br>1500 EUR per participant | |
| **Organisational Support** | Costs directly linked to the implementation of mobility activities (excluding subsistence for participants), including preparation (pedagogical, intercultural, linguistic), monitoring and support of participants during mobility, validation of learning outcomes, dissemination activities. | Contribution to unit costs | up to the 100th participant: 350 EUR per participant<br>+<br>beyond the 100th participant: 200 EUR per additional participant | Based on the number of participants |

[42] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[43] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

| | | | | |
|---|---|---|---|---|
| **Individual support** | Costs directly linked to the subsistence of participants, including accompanying persons, during the activity | Contribution to unit costs | up to the 14th day of activity: A3.1 per day per participant<br>+<br>between the 15th and 60th day of activity: 70% of A3.1 per day per participant | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity. |
| **Course fees** | Costs directly linked to payment of fees for the enrolment in courses | Contribution to unit costs | 70 EUR per participant per day<br>Maximum of 700 EUR per participant in the mobility project | Conditional: the request for financial support to cover course fees, special needs support and exceptional costs must be motivated in the application form |
| **Special needs support** | Additional costs directly related to participants with disabilities and accompanying persons (including costs related to travel and subsistence, if justified and as long as a grant for these participants is not requested through budget categories "travel" and "individual support"). | Real costs | 100% of eligible costs | |
| **Exceptional costs** | Costs for providing a financial guarantee, if the National Agency asks for it.<br><br>Expensive travel costs of participants (for details, see section "what else you should know about this action"). | Real costs | 75% of eligible costs<br><br>Expensive travel costs: maximum up to 80% of eligible costs | |

**TABLE 1 – INDIVIDUAL SUPPORT (AMOUNTS IN EURO PER DAY)**

The amounts depend on the country where the activity takes place. Each National Agency will define - on the basis of objective and transparent criteria - the amounts applicable to projects submitted in their country. These amounts will be set within the minimum and maximum ranges provided in the table below. The exact amounts will be published on the website of each National Agency.

| Receiving country | Staff mobility |
|---|---|
| | Min-Max (per day) |
| | A3.1 |
| **Norway, Denmark, Luxembourg, United Kingdom, Iceland, Sweden, Ireland, Finland, Liechtenstein** | 80-180 |
| **Netherlands, Austria, Belgium, France, Germany, Italy, Spain, Cyprus, Greece, Malta, Portugal** | 70-160 |
| **Slovenia, Estonia, Latvia, Croatia, Slovakia, Czech Republic, Lithuania, Turkey, Hungary, Poland, Romania, Bulgaria, the Former Yugoslav Republic of Macedonia** | 60-140 |

## MOBILITY PROJECT FOR ADULT EDUCATION STAFF

This mobility project can comprise one or more of the following activities:

**Staff mobility:**

- **teaching/training assignments:** this activity allows staff of adult education organisations to teach or provide training at a partner organisation abroad.
- **structured courses or training events abroad:** support the professional development of adult education staff;.
- **Job shadowing:** provides an opportunity for adult education staff to spend a period abroad in any relevant organisation active in the adult education field.

These activities are also an opportunity for staff of adult education organisations to gain competences in addressing the needs of adult learners with disadvantaged backgrounds. Given the current context concerning young migrants, refugees and asylum seekers, particular attention will be also given to support projects that train staff of adult education organisations in such areas as training refugee adult learners, intercultural classrooms, teaching adult learners in their second language, classroom tolerance and diversity.

### WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN THIS PROJECT?

Participating organisations involved in the mobility project assume the following roles and tasks:

- Applicant organisation: in charge of applying for the mobility project, signing and managing the grant agreement and reporting. The applicant can be a consortium coordinator: leading a national mobility consortium of partner organisations of the same country aimed at sending adult education staff to activities abroad. The consortium coordinator can also – but not necessarily – act as sending organisation.
- Sending organisation: in charge of selecting staff and professionals active in the field of adult education and sending them abroad. The sending organisation is either the applicant organisation or a partner in a national mobility consortium.
- Receiving organisation: in charge of receiving foreign adult education staff and offering them a programme of activities, or benefiting from a training activity provided by them.

The specific role of the receiving organisation depends on the type of activity and the relationship with the sending organisation. The receiving organisation may be:

- a course provider (in the case of participation in a structured course or training event);
- a partner or any other relevant organisation active in the adult education field (in the case of e.g. job shadowing or teaching assignments). In this case, the sending organisation, together with the participants, should agree the objectives and activities for the period abroad and specify the rights and obligations of each party before the start of the activity.

Erasmus+ supports learning mobility of staff that:

- is framed within a European Development Plan of the sending organisations (aimed at modernising and internationalising their mission);
- responds to clearly identified staff development needs;
- is accompanied by appropriate selection, preparation and follow-up measures;
- ensures that the learning outcomes of participating staff are properly recognised and
- ensures that the learning outcomes are disseminated and widely used within the organisation.

### WHAT ARE THE CRITERIA USED TO ASSESS THIS PROJECT?

Here below are listed the formal criteria that an adult education mobility project must respect in order to be eligible for an Erasmus+ grant:

**ELIGIBILITY CRITERIA**

| | |
|---|---|
| **Eligible activities** | An adult education mobility project must comprise one or more of the following activities:<br>▪ teaching/training assignments;<br>▪ structured courses or training events abroad;<br>▪ job shadowing |
| **Eligible participating organisations** | A participating organisation can be:<br>▪ any public or private organisation active in the field of non-vocational adult education (defined as adult education organisation)<br>or<br>▪ any public or private organisation active in the labour market or in the fields of education, training and youth.<br>For example, such organisations can be:<br>– an adult education school/institute/centre;<br>– an establishment for adult learners with special needs;<br>– a higher education institution (including those providing educational opportunities for adults);<br>– a public or private, a small, medium or large enterprise (including social enterprises);<br>– a social partner or other representative of working life, including chambers of commerce, craft/professional associations and trade unions;<br>– a public body at local, regional or national level;<br>– a research institute;<br>– a foundation;<br>– a school/institute/educational centre;<br>– a non-profit organisation, association, NGO;<br>– a cultural organisation, library, museum;<br>– a body providing career guidance, professional counselling and information services.<br>Each organisation must be established in a Programme Country. |
| **Who can apply?** | ▪ A non-vocational adult education organisation sending its staff abroad;<br>▪ A non-vocational adult education organisation, acting as coordinator of a national mobility consortium of non-vocational adult education organisations.<br>Individuals cannot apply directly for a grant. |
| **Number of participating organisations** | Only the sending organisation needs to be identified at the time of applying for a grant.<br>However, in the case of projects presented by a national mobility consortium, all members of the consortium must be from the same Programme Country and need to be identified at the time of applying for a grant. A consortium must comprise at least three adult education organisations.<br>During the stage of implementation of the mobility project, minimum two organisations (at least one sending and at least one receiving organisation) from different Programme Countries must be involved. |
| **Duration of project** | 1 to 2 years. The applicant must choose the duration at application stage, based on the objective of the project and on the type of activities planned over time. |
| **Duration of activity** | From 2 days to 2 months, excluding travel time.<br>The minimum 2 days must be consecutive. |
| **Venue(s) of the activity** | Participants must carry out their mobility activity abroad, in another Programme Country. |
| **Eligible participants** | Staff in charge of adult education, in a working relation with the sending adult education organisation(s), as well as ther staff involved in the strategical development of the organisation. |
| **Where to apply?** | To the National Agency of the country in which the applicant organisation is established. |

| | |
|---|---|
| **When to apply?** | Applicants have to submit their grant application by **1 February at 12:00 (midday Brussels time)** for projects starting between 1 June and 31 December of the same year.<br>**Possible additional deadline:**<br>National Agencies may organise a second round of applications if funds remain unused, for which the rules set out in this Guide will also apply. National Agencies will inform of this possibility via their website.<br><br>If a second round is organised, applicants have to submit their grant application by **4 October at 12:00 (midday Brussels time)** for projects starting between 1 January and 31 May of the following year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |
| **Other criteria** | An adult education organisation or national mobility consortium of adult education organisations can apply only once per selection round. However, an adult education organisation may be part of or coordinate several different consortia applying at the same time. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

**AWARD CRITERIA**

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives of the Action (see section "What are the aims of a mobility project");<br>- the needs and objectives of the participating organisations and of the individual participants.<br>▪ The extent to which the proposal is suitable of:<br>- producing high-quality learning outcomes for participants;<br>- reinforcing the capacities and international scope of the participating organisations. |
| **Quality of the project design and implementation (maximum 40 points)** | ▪ The clarity, completeness and quality of all the phases of the project proposal (preparation, implementation of mobility activities and follow-up);<br>▪ The consistency between project objectives and activities proposed;<br>▪ The quality of the European Development Plan of the applicant organisation;<br>▪ The quality of the practical arrangements, management and support modalities;<br>▪ The quality of the preparation provided to participants;<br>▪ The quality of arrangements for the recognition and validation of participants' learning outcomes, as well as the consistent use of European transparency and recognition tools;<br>▪ The appropriateness of measures for selecting and/or involving participants in the mobility activities;<br>▪ If applicable, the quality of cooperation and communication between the participating organisations, as well as with other relevant stakeholders. |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the project;<br>▪ The potential impact of the project:<br>- on participants and participating organisations during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the project within and outside the participating organisations. (including the use of EPALE, whenever relevant). |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 15 points for the categories "relevance of the project" and "impact and dissemination"; 20 points for the category "quality of the project design and implementation").

## WHAT ELSE SHOULD YOU KNOW ABOUT THIS ACTION?

### EXCEPTIONAL COSTS

Applicants of mobility projects will be allowed to claim financial support for travel costs of participants under the budget heading "exceptional costs" (up to a maximum of 80% of total eligible costs: see "What are the funding rules?"). This would be allowed provided that applicants can justify that the standard funding rules (based on contribution to unit costs per travel distance band) do not cover at least 70% of the travel costs of participants.

### OTHER INFORMATION

More compulsory criteria and additional useful information relating to this Action can be found in Annex I of this Guide. Interested organisations are invited to read carefully the relevant sections of this Annex before applying for financial support.

## WHAT ARE THE FUNDING RULES?

The budget of the mobility project must be drafted according to the following funding rules (in euro):

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return | Contribution to unit costs | For travel distances between 10 and 99KM:<br>20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[44]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[45]. |
| | | | For travel distances between 100 and 499 KM:<br>180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM:<br>275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM:<br>360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM:<br>530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM:<br>820 EUR per participant | |
| | | | For travel distances of 8000 KM or more:<br>1500 EUR per participant | |
| **Organisational Support** | Costs directly linked to the implementation of mobility activities (excluding subsistence for participants), including preparation (pedagogical, intercultural, linguistic), monitoring and support of participants during mobility, validation of learning outcomes, dissemination activities. | Contribution to unit costs | up to the 100th participant: 350 EUR per participant<br>+<br>beyond the 100th participant: 200 EUR per additional participant | Based on the number of participants |

[44] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[45] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

| | | | | |
|---|---|---|---|---|
| **Individual support** | Costs directly linked to the subsistence of participants, including accompanying persons, during the activity | Contribution to unit costs | up to the 14th day of activity: A4.1 per day per participant<br>+<br>between the 15th and 60th day of activity: 70% of A4.1 per day per participant | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity. |
| **Course fees** | Costs directly linked to payment of fees for the enrolment in courses | Contribution to unit costs | 70 EUR per participant per day<br>Maximum of 700 EUR per participant in the mobility project | Conditional: the request for financial support to cover course fees, special needs support and exceptional costs must be motivated in the application form |
| **Special needs support** | Additional costs directly related to participants with disabilities and accompanying persons (including costs related to travel and subsistence, if justified and as long as a grant for these participants is not requested through budget categories "travel" and "individual support"). | Real costs | 100% of eligible costs | |
| **Exceptional costs** | Costs for providing a financial guarantee, if the National Agency asks for it.<br><br>Expensive travel costs of participants (for details, see section "what else you should know about this action"). | Real costs | 75% of eligible costs<br><br>Expensive travel costs: maximum up to 80% of eligible costs | |

**TABLE 1 – INDIVIDUAL SUPPORT (AMOUNTS IN EURO PER DAY)**

The amounts depend on the country where the activity takes place. Each National Agency will define - on the basis of objective and transparent criteria - the amounts applicable to projects submitted in their country. These amounts will be set within the minimum and maximum ranges provided in the table below. The exact amounts will be published on the website of each National Agency.

| Receiving country | Staff mobility |
|---|---|
| | Min-Max (per day) |
| | A4.1 |
| **Norway, Denmark, Luxembourg, United Kingdom, Iceland, Sweden, Ireland, Finland, Liechtenstein** | 80-180 |
| **Netherlands, Austria, Belgium, France, Germany, Italy, Spain, Cyprus, Greece, Malta, Portugal** | 70-160 |
| **Slovenia, Estonia, Latvia, Croatia, Slovakia, Czech Republic, Lithuania, Turkey, Hungary, Poland, Romania, Bulgaria, the Former Yugoslav Republic of Macedonia** | 60-140 |

# MOBILITY PROJECT FOR YOUNG PEOPLE AND YOUTH WORKERS

Two types of projects can be supported under this Action:

- Mobility projects that can comprise of Youth Exchanges and/or Youth Workers activities.
- Mobility projects that can comprise of one or more volunteering activities. Further to the Commission Communication "Investing in Europe's youth" (December 2017), launching the European Solidarity Corps, the Erasmus+ Programme covers, as from 2018, the two following activity types in the area of volunteering[46]:
    - 'Erasmus+ volunteering activities', based on cooperation between organisations from EU Member States and non-EU Erasmus+ Programme Countries;
    - 'Erasmus+ volunteering activities', based on cooperation between organisations from Erasmus+ Programme Countries and Partner Countries neighbouring the EU;

In 2018, in the selection of projects, emphasis will be put on:

- reaching out to marginalised young people, promoting diversity, intercultural and inter-religious dialogue, common values of freedom, tolerance and respect of human rights as well as on projects enhancing media literacy, critical thinking and sense of initiative of young people as well as
- equipping youth workers with competences and methods needed for transferring the common fundamental values of our society particularly to the hard to reach young people and preventing violent radicalisation of young people as well.

In this regard, taking into account the critical context in Europe - and considering the fact that youth work, non-formal learning activities and volunteering can significantly contribute to address the needs of refugees, asylum seekers and migrants and/or increase awareness about this issue within local communities – particular attention will also be given to support youth mobility projects involving or focussing on the refugees/asylum seekers and migrants.

## MOBILITY PROJECTS FOR YOUNG PEOPLE AND YOUTH WORKERS: YOUTH EXCHANGES AND YOUTH WORKERS MOBILITY[47]

A mobility project can combine one or more of the below activities:

- **Mobility of young people: Youth Exchanges**

Youth Exchanges allow groups of young people from at least two different countries to meet and live together for up to 21 days. During a Youth Exchange, participants, supported by group leaders, jointly carry out a work programme (a mix of workshops, exercises, debates, role-plays, simulations, outdoor activities, etc.) designed and prepared by them before the Exchange. Youth Exchanges allow young people to: develop competences; become aware of socially relevant topics/thematic areas; discover new cultures, habits and life-styles, mainly through peer-learning; strengthen values like solidarity, democracy, friendship, etc. The learning process in Youth Exchanges is triggered by methods of non-formal education. The rather short duration makes the involvement of young people with fewer opportunities appropriate; as such a Youth Exchange offers an international mobility experience in the safety of a group with the possibility of having an adequate number of group leaders to take care of the participants. A Youth Exchange can also be a good setting for discussing and learning about inclusion and diversity issues. Youth Exchanges are based on a transnational cooperation between two or more participating organisations from different countries within and outside the European Union.

The following activities are not eligible for grants under Youth Exchanges: academic study trips; exchange activities which aim to make financial profit; exchange activities which can be considered as tourism; festivals; holiday travel; performance tours.

[46] Subject to having the European Solidarity Corps legal basis adopted in 2018, volunteering activities between Erasmus+ Programme Countries which are EU Member States will be supported by the European Solidarity Corps in the form of "volunteering placements". The rules and conditions for these activities will be described in a dedicated Programme Guide/European Solidarity Corps Call for Proposals.

[47] The main budget of these Mobility Projects is allocated to support transnational activities involving organisations and participants from Programme Countries. However, around 25% of the budget available can fund international activities including organisations and participants from Programme and Partner Countries neighbouring the EU (regions 1 to 4; see section "Eligible countries" in Part A of this Guide).

- **Mobility of Youth Workers**

This activity supports the professional development of youth workers, through the implementation of activities such as transnational/international seminars, training courses, contact-making events, study visits, etc. or job shadowing/observation periods abroad in an organisation active in the youth field. All these activities are arranged by the organisations participating in the project. The participation of youth workers in such activities contributes to capacity building of their organisation and should have a clear impact on youth workers' daily work with young people. The learning outcomes should be further disseminated in the youth field.

#### WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN THIS PROJECT?

Participating organisations involved in the mobility project assume the following roles and tasks:

- Coordinator of a youth mobility project: applying for the whole project on behalf of all the partner organisations.
- Sending organisation: in charge of sending young people and youth workers abroad (this includes: organising practical arrangements; preparing participants before departure; providing support to participants during all the phases of the project).
- Receiving organisation: in charge of hosting the activity, developing a programme of activities for participants in cooperation with participants and partner organisations, providing support to participants during all the phases of the project.

#### WHAT ARE THE CRITERIA USED TO ASSESS THIS PROJECT?

Here below are listed the formal criteria that the mobility project must respect in order to be eligible for an Erasmus+ grant:

##### GENERAL ELIGIBILITY CRITERIA

| | |
|---|---|
| **Eligible activities** | A youth mobility project must comprise one or more of the following activities:<br>▪ Youth Exchanges;<br>▪ Mobility of Youth Workers |
| **Eligible participating organisations** | A participating organisation can be:<br>▪ a non-profit organisation, association, NGO;<br>▪ a European Youth NGO;<br>▪ a social enterprise;<br>▪ a public body at local level;<br>▪ a group of young people active in youth work but not necessarily in the context of a youth organisation (i.e. informal group of young people).<br>as well as:<br>▪ a public body at regional or national level[48];<br>▪ an association of regions ;<br>▪ a European Grouping of Territorial Cooperation;<br>▪ a profit-making body active in Corporate Social Responsibility.<br>established in a Programme Country or in a Partner Country neighbouring the EU (regions 1 to 4; see section "Eligible Countries" in Part A of this Guide). |

[48] In this context a public body at national or regional level is considered a public body that 1) provides services or has an administrative area of competence that covers the whole national or regional territory and b) has a monopoly, in the sense that there are no other bodies that carry out the same functions in the country or region (typical examples: Ministries, State Agencies, Regional public authorities, etc.). In this sense, schools, universities or other bodies, even if they are established by national law, are excluded from this category and qualify as public bodies at local level.

| | |
|---|---|
| **Who can apply?** | Any participating organisation or group[49] established in a Programme Country can be the applicant. This organisation applies on behalf of all participating organisations involved in the project.<br>A youth mobility project is funded in a specific way (see the section "funding rules") if the applicant is:<br>▪ a public body at regional or national level[50];<br>▪ an association of regions;<br>▪ a European Grouping of Territorial Cooperation;<br>▪ a profit-making body active in Corporate Social Responsibility. |
| **Number and profile of participating organisations** | A mobility activity is transnational and involves at least two participating organisations (sending and receiving organisation) from different countries. If a Youth mobility project foresees only one activity, the coordinator must also act either as sending or receiving organisation. If a youth mobility project foresees more than one activity, the project coordinator can – but not necessarily has to – act as sending organisation or receiving organisation. In all cases, the coordinator cannot be an organisation from a Partner Country neighbouring the EU.<br>**Activities within Programme Countries:** all participating organisations must be from a Programme Country.<br>**Activities with Partner Countries neighbouring the EU:** the activity must involve at least one participating organisation from a Programme Country and one participating organisation from a Partner Country neighbouring the EU. |
| **Duration of project** | From 3 to 24 months. |
| **Where to apply?** | To the National Agency of the country in which the applicant organisation is established. |
| **When to apply?** | Applicants have to submit their grant application by the following dates:<br>▪ **1 February at 12:00 (midday Brussels time)** for projects starting between 1 May and 30 September of the same year;<br>▪ **26 April at 12:00 (midday Brussels time)** for projects starting between 1 August and 31 December of the same year;<br>▪ **4 October at 12:00 (midday Brussels time)** for projects starting between 1 January and 31 May of the following year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |
| **Other criteria** | A timetable for each of the activities planned in the project must be annexed to the application form.<br>A Declaration of Honour of the legal representative must be annexed to the application form. |

**ADDITIONAL ELIGIBILITY CRITERIA FOR YOUTH EXCHANGES**

| | |
|---|---|
| **Duration of activity** | From 5 to 21 days, excluding travel time. |
| **Venue(s) of the activity** | The activity must take place in the country of one of the organisations participating in the activity. |
| **Eligible participants** | Young people aged between 13 and 30[51] resident in the countries of the sending or receiving organisations. Group leaders[52] involved in the Youth Exchange must be at least 18-years old. |

[49] In case of an informal group, one of the members of the group who is at least 18-years old assumes the role of representative and takes responsibility on behalf of the group).
[50] See previous note.
[51] Please consider the following:
- lower age limits - participants must have reached the minimum age at the start date of the activity.
- upper age limits - participants must not be older than the indicated maximum age at the application deadline.

[52] A group leader is an adult who joins the young people participating in a Youth Exchange in order to ensure their effective learning, protection and safety.

| | |
|---|---|
| **Number of participants and composition of national groups** | Minimum 16 and maximum of 60 participants (group leader(s) not included).<br>Minimum 4 participants per group (group leader(s) not included).<br>Each national group must have at least one group leader.<br>A group of participants from the country of the receiving organisation must be involved in each activity. |
| **Other criteria** | In order to maintain a clear link to the country where the National Agency is based, at least one of the sending organisations or the receiving organisation in each activity must be from the country of the National Agency to which the application is submitted.<br>Advance Planning Visit (APV):<br>If the project foresees an APV, then the following eligibility criteria must be respected:<br>▪ duration of the APV: maximum 2 days (travel days excluded);<br>▪ number of participants: 1 participant per group. The number of participants can be raised to 2 under the condition that the second participant is a young person taking part in the activity without having a role as a group leader or trainer. |

**ADDITIONAL ELIGIBILITY CRITERIA FOR MOBILITY OF YOUTH WORKERS**

| | |
|---|---|
| **Duration of activity** | From 2 days to 2 months, excluding travel time.<br>The minimum 2 days must be consecutive. |
| **Venue(s) of the activity** | The activity must take place in the country of one of the organisations participating in the activity. |
| **Eligible participants** | No age limits. Participants, with the exception of trainers and facilitators, must be resident in the country of their sending or receiving organisation. |
| **Number of participants** | Up to 50 participants (including, where relevant, trainers and facilitators) in each activity planned by the project.<br>Participants from the country of the receiving organisation must be involved in each activity. |
| **Other criteria** | In order to maintain a clear link to the country where the National Agency is based, at least one of the sending organisations or the receiving organisation in each activity must be from the country of the National Agency to which the application is submitted |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

**AWARD CRITERIA**

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives of the Action (see section "What are the aims of a mobility project"):<br>- the needs and objectives of the participating organisations and of the individual participants.<br>▪ The extent to which the proposal is suitable of:<br>- reaching out to young people with fewer opportunities including refugees, asylum seekers and migrants;<br>- promoting diversity, intercultural and inter-religious dialogue, common values of freedom, tolerance and respect of human rights as well as on projects enhancing media literacy, critical thinking and sense of initiative of young people;<br>- equipping youth workers with competences and methods needed for transferring the common fundamental values of our society particularly to the hard to reach young people and preventing violent radicalisation of young people.<br>▪ The extent to which the proposal is suitable of:<br>- producing high-quality learning outcomes for participants;<br>- reinforcing the capacities and international scope of the participating organisations.<br>▪ The extent to which the proposal involves newcomers to the Action. |
| **Quality of the project design and implementation (maximum 40 points)** | ▪ The clarity, completeness and quality of all the phases of the project proposal (preparation, implementation of mobility activities and follow-up);<br>▪ The consistency between project objectives and activities proposed;<br>▪ The quality of the practical arrangements, management and support modalities;<br>▪ The quality of the preparation provided to participants;<br>▪ The quality of the non-formal learning participative methods proposed;<br>▪ The extent to which the young people are actively involved at all levels of the project;<br>▪ The quality of arrangements for the recognition and validation of participants' learning outcomes, as well as the consistent use of European transparency and recognition tools;<br>▪ The appropriateness of measures for selecting and/or involving participants in the mobility activities;<br>▪ In case of activities with Partner Countries neighbouring the EU, the balanced representation of organisations from Programme and Partner Countries;<br>• The quality of cooperation and communication between the participating organisations, as well as with other relevant stakeholders. |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the project.<br>▪ The potential impact of the project:<br>- on participants and participating organisations during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the project within and outside the participating organisations. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 15 points for the categories "relevance of the project" and "impact and dissemination"; 20 points for the category "quality of the project design and implementation").

## MOBILITY PROJECTS FOR YOUNG PEOPLE: VOLUNTEERING PROJECTS

Volunteering activities allow young people aged 17-30 to express their personal commitment through unpaid and full-time voluntary service in another country within or outside the European Union. Young volunteers are given the opportunity to contribute to the daily work of organisations dealing with youth information and policies, young people's personal and socio-educational development, civic engagement, social care, inclusion of disadvantaged, environment, non-formal education programmes, ICTs and media literacy, culture and creativity, development cooperation, etc. Volunteers can do their voluntary service either individually or in group.

The participation in a volunteering activity must be free of charge for volunteers, with the exception of a possible contribution for travel costs (if the Erasmus+ grant does not fully cover these costs) and additional expenses not linked to the implementation of the activity. The essential costs for volunteers' participation in the activity are covered by the Erasmus+ grant or through other means afforded by the participating organisations. Young people with fewer opportunities can receive additional support to enable their participation.

The following activities are not considered as volunteering activities within the framework of Erasmus+: occasional, unstructured, part-time volunteering; a work placement in an enterprise; a paid job; a recreation or tourist activity; a language course; exploitation of a cheap workforce; a period of study or vocational training abroad.

A volunteering project can combine one or more of the below activities:

- **Individual Volunteering activities**

Individual volunteering activities are carried out for a period of 2 months to up to 12 months. Young people with fewer opportunities can volunteer abroad for a shorter duration starting from 2 weeks.

Besides the support provided to the volunteers by the participating organisations, the National Agencies or regional SALTOs organise a Training and Evaluation Cycle[53] to be attended by each volunteer and consisting of: a) an on-arrival training for services lasting 2 months and longer; b) a mid-term evaluation, for voluntary services lasting 6 months and longer. On-arrival trainings for activities lasting less than 2 months and including young people with fewer opportunities could be organised by organisations.

- **Group Volunteering activities**

Group volunteering activities are carried out by groups of at least 10 young people and a maximum of 40, for a period between 2 weeks and 2 months. For a given group, the volunteers carry out their activity jointly in the same time frame and place and the tasks are linked to a common thematic.

Complementary activities aiming at strengthening the impact of the project

Additionally, the project may include the organisation of relevant side activities to reach its objectives as well as to strengthen its systemic impact on the local, regional, and/or European level. These complementary activities could also aim at raising awareness of the value of volunteering for young people and for communities as well as strengthening the recognition of the skills and competences gained by the volunteers. Those activities could be job shadowing, meetings, workshops, conferences, seminars, training courses, coaching, etc.

### WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN THIS PROJECT?

**Participating organisations** involved in the mobility project assume the following roles and tasks:

- Coordinator of a project: applying for the whole project on behalf of all the partner organisations and responsible for the overall management of the project.
- Sending organisation: in charge of sending volunteer(s) abroad (this includes: organising practical arrangements; preparing participants before departure; providing support to participants during all the phases of the project).
- Receiving organisation: in charge of hosting the volunteer(s), developing a programme of activities, providing support to participants during all the phases of the project.

**Associated partners**: In addition to the organisations formally participating in the volunteering activities, a project may also involve associated partners from the public or private sector who contribute to the implementation of specific project

[53] Detailed information can be found in the document " Training and Evaluation Cycle Guidelines and minimum quality standards for Erasmus+ volunteering activities": http://ec.europa.eu/programmes/erasmus-plus/sites/erasmusplus/files/library//evs-training-evaluation-guidelines_en.pdf

tasks/activities or support the dissemination and sustainability of the project. For contractual management issues, associated partners are not considered as part of the project partners, and they do not receive funding. However, their involvement and role in the project and different activities have to be clearly described, as well as how they can bring added value to the planned activities by investing resources and know-how.

## WHAT ARE THE CRITERIA USED TO ASSESS THIS PROJECT?

Here below are listed the formal criteria that the project must respect in order to be eligible for an Erasmus+ grant:

### GENERAL ELIGIBILITY CRITERIA

| | |
|---|---|
| **Eligible participating organisations** | A participating organisation can be:<br>▪ a non-profit organisation, association, NGO;<br>▪ a European Youth NGO;<br>▪ a social enterprise;<br>▪ a public body at local level.<br>as well as:<br>▪ a public body at regional or national level[54];<br>▪ an association of regions ;<br>▪ a European Grouping of Territorial Cooperation;<br>▪ a profit-making body active in Corporate Social Responsibility.<br><br>established in a Programme Country or in a Partner Country neighbouring the EU (regions 1 to 4; see section "Eligible Countries" in Part A of this Guide). |
| **Who can apply?** | Any participating organisation established in a Programme Country and holding a valid Coordinating Organisation accreditation or a relevant European Solidarity Corps Quality Label at the application deadline. |
| **Number of participating organisations** | A mobility activity is transnational and involves at least two participating organisations (sending and receiving organisation) from different countries, of which at least one needs to be a non-EU Programme Country or a Partner Country neighbouring the EU. |
| **Accreditation** | The participating organisations, with the exception of the applicant, must hold a valid accreditation at the first day of the volunteering activity in which the relevant organisation is involved. |
| **Duration of project** | From 3 to 24 months.<br>In all cases, projects must end not later than 31 August 2021. |
| **Duration of the service** | **Individual volunteering activities**: From 2[55] to 12 months, excluding travel time.<br>In the case of young people with fewer opportunities, the Service can start as from 2 weeks. |
| **Group volunteering activities:** | From 2 weeks to 2 months[56], excluding travel time. |
| **Venue(s) of the service[57]** | **A volunteer from a Member State of the EU** must carry out her/his service in a non-EU Programme country or in a Partner Country neighbouring the EU.<br>**A volunteer from a non-EU Programme Country** must carry out her/his service in a Programme country or in a Partner Country neighbouring the EU.<br>**A volunteer from a Partner Country neighbouring the EU** must carry out her/his service in a Programme Country. |

[54] In this context a public body at national or regional level is considered a public body that 1) provides services or has an administrative area of competence that covers the whole national or regional territory and b) has a monopoly, in the sense that there are no other bodies that carry out the same functions in the country or region (typical examples: Ministries, State Agencies, Regional public authorities, etc.). In this sense, schools, universities or other bodies, even if they are established by national law, are excluded from this category and qualify as public bodies at local level.

[55] As from 60 days, excluding travel days

[56] Up to 59 days, excluding travel days.

57 Volunteering activities from EU Member States to EU Member States are financed through the European Solidarity Corps Programme.

| | |
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| **Eligible participants** | Young people aged between 17 and 30[58], resident in the country of their sending organisation. Volunteers having already taken part in an Erasmus+ volunteering activity or a European Voluntary Service are not eligible.<br>**Exception:** volunteers who carried out a volunteering activity or an EVS lasting maximum 2 months can take part in an additional volunteering activity. |
| **Number of participants** | **Group volunteering activities:** Minimum 10 and a maximum of 40 volunteers per activity. |
| **Where to apply?** | To the National Agency of the country in which the applicant organisation is established. |
| **When to apply?** | Applicants have to submit their grant application by the following dates:<br>▪ **1 February at 12:00 (midday Brussels time)** for projects starting between 1 May and 30 September of the same year;<br>▪ **26 April at 12:00 (midday Brussels time)** for projects starting between 1 August and 31 December of the same year;<br>▪ **4 October at 12:00** (**midday Brussels time)** for projects starting between 1 January and 31 May of the following year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |
| **Other criteria** | The application must be submitted to the National Agency of the country of the applicant.<br>In order to maintain a clear link to the country where the National Agency is based, either the sending or the receiving organisation must be from the country of the National Agency to which the application is submitted.<br>Advance Planning Visit (APV):<br>If the project foresees an APV, then the following eligibility criteria must be respected:<br>▪ duration of the APV: maximum 2 days (travel days excluded);<br>▪ number of participants: 1 participant per Sending Organisation. The number of participants can be raised provided that all additional participants are volunteers with fewer opportunities taking part in the activity.<br>A Declaration of Honour of the legal representative must be annexed to the application form. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

58 Please consider the following:
- lower age limits - participants must have reached the minimum age at the start of the activity.
- Upper age limits – participants must be older than the indicated maximum age at application deadline.

**AWARD CRITERIA**

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives of the Action (see section "What are the aims of a mobility project"):<br>- the needs and objectives of the participating organisations and of the individual participants:<br>- the demonstrated understanding of the Erasmus+ volunteering principles as laid out in the Erasmus+ volunteering Charter.<br>▪ The extent to which the proposal is suitable of:<br>- reaching out to young people with fewer opportunities including refugees, asylum seekers and migrants;<br>- promoting diversity, intercultural and inter-religious dialogue, common values of freedom, tolerance and respect of human rights as well as on projects enhancing media literacy, critical thinking and sense of initiative of young people;<br>▪ The extent to which the proposal is suitable of:<br>- producing high-quality learning outcomes for participants;<br>- reinforcing the capacities and international scope of the participating organisations;<br>- In cases where associated partners involved: including the associated partners in relevant tasks.<br>▪ The extent to which the proposal involves newcomers to the Action. |
| **Quality of the project design and implementation (maximum 40 points)** | ▪ The appropriate experience of the organisation to reach the objectives of the project;<br>▪ The consistency between the project objectives and activities proposed;<br>▪ The clarity, completeness and quality of all the phases of the project proposal (preparation, implementation of mobility activities and follow-up);<br>▪ The quality of the practical arrangements, management and support modalities;<br>▪ The quality of the preparation provided to participants;<br>▪ The quality of the non-formal learning participative methods proposed;<br>▪ The extent to which the participants are actively involved at all levels of the project;<br>▪ The appropriateness of measures for selecting and/or involving participants in the mobility activities;<br>▪ The quality of arrangements for the recognition and validation of participants' learning outcomes, as well as the consistent use of European transparency and recognition tools;<br>▪ In case of activities involving Partner Countries neighbouring the EU, the balanced representation of volunteers from Programme and Partner Countries;<br>▪ The quality of the selection, cooperation and communication with project partners. |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the project.<br>▪ The potential impact of the project:<br>- on participants and participating organisations during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the project within and outside the participating organisations. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 17,5 points for the categories

"relevance of the project" and "impact and dissemination"; 15 points for the category "quality of the project design and implementation").

## WHAT ELSE SHOULD YOU KNOW ABOUT THIS ACTION?

### ONLINE LINGUISTIC SUPPORT

Young volunteers doing a volunteering activity lasting two months or longer are eligible to receive linguistic support. Online linguistic support is being gradually implemented in the course of the Programme. It is made available by the European Commission to eligible participants to assess their foreign language competences and to offer, where necessary, the most appropriate language learning before and/or during mobility (for more details, see Annex I of this Guide).

### PARTICIPANTS IN MOBILITY ACTIVITIES BETWEEN PROGRAMME COUNTRIES

Applicants of mobility projects will be allowed to claim financial support for travel costs of participants under the budget heading "exceptional costs" (up to a maximum of 80% of total eligible costs: see "What are the funding rules?"). This would be allowed provided that applicants can justify that the standard funding rules (based on contribution to unit costs per travel distance band) do not cover at least 70% of the travel costs of participants.

### OTHER INFORMATION

More compulsory criteria and additional useful information relating to this Action can be found in Annex I of this Guide. Interested organisations are invited to read carefully the relevant sections of this Annex before applying for financial support.

## WHAT ARE THE FUNDING RULES?

The budget of the mobility project must be drafted according to the following funding rules (in euro):

### A) YOUTH EXCHANGES

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return.<br><br>In addition, if applicable, travel costs for a possible Advance Planning Visit. | Contribution to unit costs | For travel distances between 10 and 99KM:<br>20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[59]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[60]. |
| | | | For travel distances between 100 and 499 KM:<br>180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM:<br>275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM:<br>360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM:<br>530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM:<br>820 EUR per participant | |
| | | | For travel distances of 8000 KM or more:<br>1500 EUR per participant | |
| **Organisational Support** | Costs directly linked to the implementation of mobility activities | Contribution to unit costs | A5.1 per day of activity per participant[61] | Based on the duration of the activity per participant (if necessary, including also one travel day before the activity and one travel day following the activity). |

[59] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[60] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band (i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

[61] Including group leaders and accompanying persons.

| | | | | |
|---|---|---|---|---|
| **Special needs support** | Additional costs directly related to participants with disabilities and accompanying persons (including costs related to travel and subsistence, if justified and as long as a grant for these participants is not requested through budget categories "travel" and "organisational support"). | Real costs | 100% of eligible costs | Conditional: the request for financial support to cover special needs support and exceptional costs must be motivated in the application form |
| **Exceptional costs** | Visa and visa-related costs, residence permits, vaccinations, medical certifications.<br>Costs to support the participation of young people with fewer opportunities on equal terms as others (excluding costs for travel and organisational support for participants).<br>Costs connected to board and lodging of participants during an Advance Planning Visit.<br>Costs for providing a financial guarantee, if the National Agency asks for it.<br>Expensive travel costs of participants (for details, see section "what else you should know about this action"). | Real costs | Costs for financial guarantee: 75% of eligible costs<br>Expensive travel costs: maximum up to 80% of eligible costs<br>Other costs: 100% of eligible costs | |

### B) MOBILITY OF YOUTH WORKERS

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return | Contribution to unit costs | For travel distances between 10 and 99KM:<br>20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[62]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[63]. |
| | | | For travel distances between 100 and 499 KM:<br>180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM:<br>275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM:<br>360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM:<br>530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM:<br>820 EUR per participant | |
| | | | For travel distances of 8000 KM or more:<br>1500 EUR per participant | |
| **Organisational Support** | Costs directly linked to the implementation of mobility activities | Contribution to unit costs | A5.2 per day of activity per participant[64].<br>Maximum 1 100 EUR per participant[65] | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity). |
| **Special needs support** | Additional costs directly related to participants with disabilities and accompanying persons (including costs related to travel and subsistence, if justified and as long as a grant for these participants is not requested through budget categories "travel" and "organisational support"). | Real costs | 100% of eligible costs | Conditional: the request for financial support to cover special needs support and exceptional costs must be motivated in the application form |

[62] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[63] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

[64] Including trainers, facilitators and accompanying persons.

[65] Including trainers, facilitators and accompanying persons.

| | | | | |
|---|---|---|---|---|
| **Exceptional costs** | Visa and visa-related costs, residence permits, vaccinations<br>Costs for providing a financial guarantee, if the National Agency asks for it.<br>Expensive travel costs of participants, (for details, see section "what else you should know about this action"). | Real costs | Costs for financial guarantee: 75% of eligible costs<br>Expensive travel costs: maximum up to 80% of eligible costs<br>Other costs: 100% of eligible costs | |

### C) VOLUNTEERING PROJECTS

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return<br><br>In addition, if applicable, travel costs for a possible Advance Planning Visit. | Contribution to unit costs | For travel distances between 10 and 99KM:<br>20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[66]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[67]. |
| | | | For travel distances between 100 and 499 KM:<br>180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM:<br>275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM:<br>360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM:<br>530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM:<br>820 EUR per participant | |
| | | | For travel distances of 8000 KM or more:<br>1500 EUR per participant | |
| **Organisational Support** | Costs directly linked to the implementation of mobility activities. | Contribution to unit costs | A5.3 per day per volunteer[68] | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity). |
| **Individual support** | "Pocket money" to the volunteer for additional personal expenses. | Contribution to unit costs | A5.4 per day per volunteer | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity) |
| **Linguistic support** | Costs linked to the support offered to participants - prior to departure or during the activity – in order to improve the knowledge of the language they will use to carry out their volunteering tasks. | Contribution to unit costs | Only for activities lasting between 2 and 12 months:<br>150 EUR per participant needing linguistic support | Conditional: applicants must request the support in the instruction language of the activity, on the basis of participants' needs for languages not offered by the Erasmus+ Online Linguistic Support. |

66 http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

67 For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

68 Including accompanying persons for volunteers with fewer opportunities.

| | | | | |
|---|---|---|---|---|
| **Special needs support** | Costs for subsistence of accompanying persons and costs related to travel if justified and as long as a grant for these participants is not requested through budget category "travel". Additional costs directly related to participants with disabilities (including costs related to travel and subsistence, if justified and as long a grant for these participants is not requested through budget categories "travel" and "organisational support"). | Real costs | 100% of eligible costs | Conditional: the request for financial support to cover special needs support must be motivated in the application form. |
| **Exceptional costs** | Visa and visa-related costs, residence permits, vaccinations, medical certifications.<br>Costs to support the participation of young people with fewer opportunities on equal terms as others, including for specific preparation and reinforced mentorship (excluding costs for travel and organisational support for participants and accompanying persons).<br>Costs connected to board and lodging of participants during an Advance Planning Visit.<br>Costs for providing a financial guarantee, if the National Agency asks for it.<br>Expensive travel costs of participants (for details, see section "what else you should know about this action"). | Real costs | Costs for financial guarantee: 75% of eligible costs<br><br>Expensive travel costs: maximum up to 80% of eligible costs<br><br>Other costs: 100% of eligible costs | Conditional: the request for financial support to cover exceptional costs must be motivated in the application form. |

| | | | | |
|---|---|---|---|---|
| **Complementary activity costs** | Costs directly linked to the implementation of the complementary activities of the project.<br><br>Indirect costs:<br>A flat-rate amount, not exceeding 7% of the eligible direct costs of the complementary activities, is eligible under indirect costs, representing the beneficiary's general administrative costs which can be regarded as chargeable to the complementary activities (e.g. electricity or internet bills, costs for premises, cost of permanent staff, etc.) | Real costs | Maximum up to 80% of eligible costs | Conditional: the request for financial support must be motivated in the application form and justified in relation to the planned activities. |

**D) ORGANISATIONAL SUPPORT**

The amounts depend on the country where the mobility activity takes place. For projects submitted by: a public body at regional or national level; an association of regions; a European Grouping of Territorial Cooperation; a profit-making body active in Corporate Social Responsibility, the below amounts are reduced by 50%.

| | Youth Exchanges (euro per day) | Mobility of youth workers (euro per day) | Volunteering activities (euro per day) |
|---|---|---|---|
| | A5.1 | A5.2 | A5.3 |
| Belgium | 42 | 65 | 26 |
| Bulgaria | 32 | 53 | 17 |
| Czech Republic | 32 | 54 | 17 |
| Denmark | 45 | 72 | 26 |
| Germany | 41 | 58 | 23 |
| Estonia | 33 | 56 | 18 |
| Ireland | 49 | 74 | 26 |
| Greece | 38 | 71 | 21 |
| Spain | 34 | 61 | 18 |
| France | 38 | 66 | 20 |
| Croatia | 35 | 62 | 19 |
| Italy | 39 | 66 | 21 |
| Cyprus | 32 | 58 | 21 |
| Latvia | 34 | 59 | 19 |
| Lithuania | 34 | 58 | 18 |
| Luxembourg | 45 | 66 | 26 |
| Hungary | 33 | 55 | 17 |
| Malta | 39 | 65 | 22 |
| Netherlands | 45 | 69 | 26 |
| Austria | 45 | 61 | 23 |
| Poland | 34 | 59 | 18 |
| Portugal | 37 | 65 | 20 |
| Romania | 32 | 54 | 17 |
| Slovenia | 34 | 60 | 20 |
| Slovakia | 35 | 60 | 19 |
| Finland | 45 | 71 | 26 |
| Sweden | 45 | 70 | 26 |
| United Kingdom | 45 | 76 | 26 |
| former Yugoslav Republic of Macedonia | 28 | 45 | 15 |
| Iceland | 45 | 71 | 26 |
| Liechtenstein | 45 | 74 | 24 |
| Norway | 50 | 74 | 26 |
| Turkey | 32 | 54 | 17 |
| Partner Country | 29 | 48 | 15 |

### E) INDIVIDUAL SUPPORT

The amounts depend on the country where the mobility activity takes place.

| | Volunteering activities (euro per day) |
|---|---|
| | A5.4 |
| Belgium | 4 |
| Bulgaria | 4 |
| Czech Republic | 5 |
| Denmark | 6 |
| Germany | 5 |
| Estonia | 4 |
| Ireland | 6 |
| Greece | 5 |
| Spain | 5 |
| France | 6 |
| Croatia | 5 |
| Italy | 5 |
| Cyprus | 5 |
| Latvia | 4 |
| Lithuania | 4 |
| Luxembourg | 5 |
| Hungary | 5 |
| Malta | 5 |
| Netherlands | 5 |
| Austria | 5 |
| Poland | 4 |
| Portugal | 5 |
| Romania | 3 |
| Slovenia | 4 |
| Slovakia | 5 |
| Finland | 5 |
| Sweden | 5 |
| United Kingdom | 6 |
| former Yugoslav Republic of Macedonia | 3 |
| Iceland | 6 |
| Liechtenstein | 6 |
| Norway | 6 |
| Turkey | 4 |
| Partner Country | 3 |

# ERASMUS MUNDUS JOINT MASTER DEGREES

## WHAT ARE THE AIMS OF AN ERASMUS MUNDUS JOINT MASTER DEGREE?

Erasmus Mundus Joint Master Degrees (EMJMD) aim to:

- foster quality improvements, innovation, excellence and internationalisation in higher education institutions (HEI);
- increase the quality and the attractiveness of the European Higher Education Area (EHEA) and supporting the EU's external action in the higher education field, by offering full degree scholarships to the best Master students worldwide;
- improve the level of competences and skills of Master graduates, and in particular the relevance of the Joint Masters for the labour market, through an increased involvement of employers.

In this regard, EMJMDs are expected to contribute to the objectives of the Europe 2020 Strategy and of the Education and Training strategic framework 2020 (ET2020), including the corresponding benchmarks established in those policies.

EMJMDs are invited to actively address the challenges of structural reforms relating to quality assurance and qualifications frameworks in the EHEA as included in the Yerevan communiqué[69], the so-called European Approach for Quality Assurance of Joint Programmes, adopted by the Conference of Ministers responsible for higher education of the EHEA/Bologna Process, and thereby contribute to promoting the transparency and mutual trust in higher education in the EHEA.

EMJMDs shall contribute to raising the attractiveness of the EHEA worldwide and demonstrating the excellence and high level of integration of the joint study programmes delivered by European HEIs.

This Action also supports EU external actions, objectives and priorities in the higher education field in their various aspects.

## WHAT IS AN ERASMUS MUNDUS JOINT MASTER DEGREE?

An EMJMD is a high-level integrated international study programme of 60, 90 or 120 ECTS credits, delivered by an international consortium of HEIs from different countries and, where relevant, other educational and/or non-educational partners with specific expertise and interest in the study areas/professional domains covered by the joint programme. Their specificity lies in the high degree of jointness/integration[70] and the excellent academic content and methodology they offer. There is no limitation in terms of discipline. The list of joint programmes funded under the Erasmus+ programme can be found on the Executive Agency website. For the list of Erasmus Mundus Joint programmes (Masters and Doctorates) funded under the previous Erasmus Mundus programme please consult the Erasmus Mundus Back Catalogue[71] .

All participating HEIs established in a Programme Country must be Master degree-awarding institutions. The corresponding Master degree(s) awarded to graduates in the framework of the EMJMD - covering the entire study programme of the EMJMD, must be duly accredited (where applicable by the competent national authorities) in the countries where these HEIs are established. The successful completion of the joint EMJMD Master programme must lead to the award of either a joint degree (i.e. one single diploma issued on behalf of at least two HEIs from different Programme Countries and dully accredited in these countries) or multiple degrees (i.e. at least two diplomas issued by two higher education institutions from different Programme Countries duly accredited in these countries). If national legislation allows, joint degrees are encouraged, as they represent a full integration of the learning and teaching process. Besides the degree-awarding HEIs from Programme Countries, other partner HEIs from Partner Countries can be involved in the award of joint or multiple degrees.

EMJMD proposals at application stage must present fully developed joint study programmes, ready to run and to be advertised worldwide immediately after their selection. In this context, the EMJMD selection process will be very selective with the aim of supporting only the very best proposals.

In return, selected EMJMDs will receive high levels of funding for four intakes of students to allow them to increase their worldwide visibility and reinforce their sustainability prospects.

The sections below describe the nature, selection and funding conditions of newly selected EMJMDs.

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69 Adopted by the European Education Ministers during the Yerevan Ministerial Conference on 14-15 May 2015. More information on the adopted policy measures: http://bologna-yerevan2015.ehea.info/pages/view/documents

70 EMJMDs are expected to have set up a jointly designed and fully integrated academic curriculum with common implementation procedures, e.g. joint student application, selection, admission and examination rules, as well as with shared quality assurance mechanisms.

71 https://eacea.ec.europa.eu/erasmus-plus/actions/key-action-1-learning-mobility-individuals/erasmus-mundus-joint-master-degrees_en

### WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

This Action will support the following activities:

- the delivery of an EMJMD programme corresponding to 60, 90 or 120 ECTS credits, organised through an international consortium of HEIs including the participation of invited scholars (guest lecturers) for teaching, training and/or research purposes;
- the award of scholarships to excellent students worldwide for their participation in one of these EMJMD programmes.

### WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN AN ERASMUS MUNDUS JOINT MASTER DEGREE?

EMJMD programmes are delivered by an international consortium of HEIs and where relevant other types of organisations (enterprises, public bodies, research organisations, etc.) contributing to the implementation of the EMJMD.

The EMJMD consortium is composed of the:

- Applicant/coordinator: a HEI established in a Programme Country that submits the project proposal on behalf of all the partners. When the EMJMD is granted, the applicant/coordinator will become the main EU grant beneficiary and will sign a multi-beneficiary grant agreement on behalf of the EMJMD consortium. Its coordinating role stands for the following duties:
  - represents and acts on behalf of the group of participating organisations vis-à-vis the European Commission;
  - bears the financial and legal responsibility for the proper operational, administrative and financial implementation of the entire project;
  - coordinates the EMJMD in cooperation with all other project partners.

- Partners: degree-awarding HEIs recognised as such by the relevant authorities of the Programme or Partner Country in which they are established and any private or public organisation that contributes actively to the preparation, implementation and evaluation of the EMJMD. Each partner must sign a mandate by which the signatory grants power of attorney to the coordinator to act in its name and on its behalf during the implementation of the project.

- Associated partners (optional): additionally the EMJMD study programme may also benefit from the involvement of associated partners. These organisations contribute indirectly to the implementation of specific tasks/activities and/or support the dissemination and sustainability of the EMJMD. Such contribution may for example take the form of knowledge and skills transfer, the provision of complementary courses or backing possibilities for secondment or placement. For contractual management issues, “associated partners” are not considered as part of the EMJMD consortium because they have a more limited role in the implementation of the EMJMD, as their expertise is called upon on an ad-hoc basis.

- Affiliated entities (optional): Organisations which contribute to the achievement of project objectives and activities. Affiliated entities must be identified in the grant application and satisfy the requirements as described in Annex III (Glossary of terms) of this Programme Guide.

The necessary institutional commitment of all the organisations participating in the EMJMD consortium must be ensured prior to the enrolment of the first EMJMD students in order to guarantee solid institutional embedding and backing. The EMJMD Consortium Agreement (see guidelines and models available on the Executive Agency website) will be a key instrument for this purpose and will have to be signed by all partner institutions prior to the launching of the first scholarship application and selection procedure. This EMJMD Consortium Agreement will have to cover as precisely as possible all academic, operational, administrative and financial aspects related to the implementation of the EMJMD and the management of the EMJMD scholarships.

### WHAT ARE THE CRITERIA USED TO ASSESS AN ERASMUS MUNDUS JOINT MASTER DEGREE?

Listed below are the formal criteria that an EMJMD must respect in order to be eligible for an Erasmus+ grant:

**ELIGIBILITY CRITERIA**

| | |
|---|---|
| **Eligible participating organisations** | A participating organisation can be any public or private organisation, with its affiliated entities (if any), established in a Programme Country or in a Partner Country that contributes directly and actively to the delivery of the EMJMD.<br>For example, such organisation can be:<br>▪ a higher education institution (HEI);<br>▪ a public or private, a small, medium or large enterprise (including social enterprises);<br>▪ a public body at local, regional or national level;<br>▪ a non-profit organisation, association, NGO;<br>▪ a research institute.<br><br>HEIs established in a Programme Country must hold a valid Erasmus Charter for Higher Education (ECHE). An ECHE is not required for participating Partner Country HEIs.<br>HEIs established in a Programme Country must be able to demonstrate at application stage the accreditation at national level of each degree-awarding Master programme on the basis of which the EMJMD programme is composed. For novel joint Master programmes that have not yet graduated students, the accreditation by the competent national authorities is required at application stage. |
| **Who can apply?** | A HEI established in a Programme Country. The HEI applies on behalf of the EMJMD consortium. Branches of Partner Country HEIs established in a Programme Country or branches of Programme Country HEIs established in a Partner Country are not eligible to apply. |
| **Number and profile of participating organisations** | An EMJMD is transnational and involves partner HEIs from at least three different Programme Countries.<br>HEIs from Programme Countries must be in a position to physically host EMJMD students and deliver at least the minimum number of ECTS credits for the study period spent in their institution.<br>All partner organisations from Programme or Partner Countries must be identified at the time of applying for a grant. |
| **Eligible participants** | Students at Master level, staff of the participating organisations, invited scholars (/guest lecturers) from Programme and Partner Countries.<br>Students will apply for a scholarship directly to the EMJMD consortium of their choice and go through a competitive selection process organised by the consortium HEIs.<br>The selection, recruitment and monitoring of individual students fall under the responsibility of the EMJMD consortium. |
| **Number of participants** | The EMJMD grant will finance a maximum of 15 student scholarship holders (i.e. a maximum of 60 student scholarships for the four intakes) and at least 4 invited scholars/guest lecturers per intake, engaged in the EMJMD activities for at least 8 weeks in total.<br>The scholars/guest lecturers must be selected in accordance with the consortium's specific selection criteria for scholars and bring concrete added value to the delivery of the EMJMD.<br>In addition, EMJMD consortia can apply for up to 12 additional student scholarships per intake (i.e. maximum 48 scholarships for the four intakes) for one or more priority regions/countries of the world. |
| **Venue(s)** | The EMJMD study period must take place in at least two of the Programme Countries represented in the consortium (i.e. at least two mobility periods for all students). Additional study periods (e. g. research, placement, thesis preparation) can take place in other participating organisations from Programme or Partner countries, under the condition that the activities concerned are implemented under the direct supervision of one of the consortium partner HEIs. |
| **Duration of project** | Depending on the duration of the EMJMD (1 to 2 years) and whether the consortium chooses to undertake a preparatory year, the consortium will receive a grant agreement for a minimum of 4 and a maximum of 6 years to finance 4 consecutive student intakes. |

| | |
|---|---|
| **Duration of activity** | Optional preparatory year: 1 academic year.<br>Implementation of the EMJMD programme: 4 consecutive intakes of 1 to 2 academic years (60/90/120 ECTS credits). |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **15 February at 12:00 (midday Brussels time)** for projects starting between 1 August and 31 October of the same year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

Applicant organisations will also be assessed against **exclusion** and **selection criteria**. For more information please consult Part C of this Guide.

**ADDITIONAL ELIGIBILITY CRITERIA FOR STUDENT SCHOLARSHIPS**

| | |
|---|---|
| **Duration of activity** | The student scholarship is awarded exclusively for a full-time enrolment in one of the Master courses and will cover the entire duration of the EMJMD study programme. |
| **Eligible participants** | Students at Master level who have obtained a first higher education degree or demonstrate a recognised equivalent level of learning according to national legislation and practices in the degree awarding countries.<br>Students who have already obtained a EMJMD scholarship or an Erasmus Mundus Master Course/Joint Doctorate scholarship are not eligible to apply for an additional scholarship under the EMJMD action.<br>EMJMD scholarship holders cannot benefit from another EU funded scholarship scheme to follow the same EMJMD course and this for the entire period of the course.<br>A minimum of 75% of EMJMD scholarships[72] will be earmarked for candidates from Partner Countries. |
| **Learning outcomes** | The successful completion of the EMJMD programme must lead to the award of either a joint degree (i.e. one single degree certificate issued on behalf of at least two higher education institutions from different Programme Countries and duly accredited in these countries) or multiple degrees (i.e. at least two degree certificates issued by two higher education institutions from different Programme Countries and duly accredited in these countries).<br>Students will have to acquire the entirety of ECTS credits covered by the EMJMD (60, 90 or 120). Moreover, for each of their mandatory study period in at least two Programme Countries, they will have to acquire at least 20 ECTS credits (for study programmes of 60 ECTS credits) or 30 ECTS credits (for study programmes of 90 or 120 ECTS credits).<br>Mobility periods cannot be replaced by virtual mobility (distance learning), which implies physical presence of the students is required during the entire Master programme. In addition, they cannot take place in institutions outside the EMJMD consortium (i.e. partners and/or associated partners). |

72 This refers to the overall number of scholarships financed, including those made available for one or more priority regions/countries of the world.

**AWARD CRITERIA**

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 40 points)** | ▪ The proposal's elements of "jointness"/integration, design and structure are tailored and effective for achieving the EMJMD aims and objectives;<br>▪ The proposal describes how the EMJMD is integrated within the degree catalogues of partner and defines the degree(s) intended to be delivered, especially the award of an EMJMD joint degree, if national legislation allows;<br>▪ The proposed EMJMD responds to clearly identified needs in the academic field;<br>▪ The proposal defines how the EMJMD aims to increase the attractiveness of the European Higher Education Area, and to foster excellence, innovation and competitiveness in terms of the academic fields/subjects targeted;<br>▪ The proposed EMJMD consortium is highly relevant with regard to internationalisation in higher education and has been designed to maximise the benefits of student and staff mobilty. |
| **Quality of the project design and implementation (maximum 20 points)** | ▪ The proposal defines the academic programme and the learning outcomes and details how the excellent academic content will be offered;<br>▪ The proposal describes a set of internal and external evaluation methods of the EMJMD, how they will be put into practice and used to monitor, upgrade and improve the quality of the course;<br>▪ The proposal defines how the student mobility is organised and is instrumental to the course objectives, and presents a draft strategy/planning for an effective involvement of scholars/guest lecturers;<br>▪ The proposal explains in detail all relevant information provided to the students/academic staff prior to course enrolment, and the services offered in terms of support for accommodation, language training, administrative formalities (e.g. visa support), and insurance;<br>▪ The proposal clearly outlines the course rules, student rights and obligations concerning the academic, administrative and financial aspects of EMJMD implementation;<br>▪ The proposal describes the envisaged activities/facilities to ensure the effective integration/networking of the EMJMD students within their socio-cultural and professional environment;<br>▪ The proposal clearly outlines the interaction between the EMJMD and non-educational actors in course implementation. |
| **Quality of the project team and the cooperation arrangements (maximum 20 points)** | ▪ The proposal clearly shows the fields of expertise of the involved partners/staff and how they are complementary and of added value for the EMJMD implementation. Where applicable, the proposal describes how existing cooperation agreements have been enhanced to meet the EMJMD's objectives;<br>▪ The proposal describes the institutional commitment of each partner, specifies their role and tasks in the EMJMD implementation, and outlines the working mechanisms of the governing bodies and management tools in place;<br>▪ The proposal describes, *inter alia,* the joint criteria, principles and requirements for student application, selection and admission requirements, student examination and performance evaluation;<br>▪ The proposal explains how the student participation costs have been calculated, and provides a description on how financial resources including complementary funding will be mobilised, allocated and managed within the partnership. |

| | |
|---|---|
| **Impact and dissemination (maximum 20 points)** | ▪ The proposal offers a convincing mid/long-term development/sustainability strategy and makes realistic projections beyond the EU funding period, and the ways to mobilise other funding sources for scholarships and self-funded students;<br>▪ The proposal explains how the EMJMD will generate impact at institutional level (faculty/university), and how it enhances the internationalisation strategy of the consortium partners towards relevant stakeholders at national/European/international level;<br>▪ The proposal describes how the proposed EMJMD encourages entrepreneurship and a sense of initiative, describes how employers will be involved in course implementation in order to improve student competencies and skills and thereby enhance the employability of graduates;<br>▪ The proposal describes the types and methods of promotion/dissemination mechanisms, its target groups, and the concrete tasks of the partners in the awareness-raising strategy of the EMJMD. It explains how it plans to attract excellent students worldwide;<br>▪ If relevant, the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limitations. |

To be considered for funding, proposals must score at least 70 points out of a total of 100. Furthermore, they must score at least 75% of the maximum allocated points under the award criterion "Relevance of the project" (i.e. minimum 30 points out of 40). In case of ex aequo, priority will be given to projects scoring highest under the criterion "Relevance of the project".

### ADDITIONAL SCHOLARSHIPS FOR STUDENTS FROM TARGETED REGIONS OF THE WORLD

The applicants may apply for additional scholarships for one or more regions of Partner Countries of the world financed by the following EU external funding instruments:

- Development Cooperation Instruments (DCI)[73]
- European Neighbourhood Instrument (ENI)[74]
- Partnership instrument (PI)[75]
- European Development Fund (EDF)

EMJMDs proposed for funding may receive up to 48 additional student scholarships for the entire duration of the Master course (four intakes). These additional scholarships are offered to respond to the external policy priorities of the EU with regard to higher education and take into consideration the different levels of economic and social development in the relevant Partner Countries. The scholarships must be allocated to students coming from the eight different regions mentioned below:

- Eastern Partnership countries (Region 2);
- South-Mediterranean countries (Region 3);
- Asia (Region 6) with a specific scholarship allocation to the Least Developed Countries[76];
- Central Asia (Region 7) with a specific scholarship allocation to the Low or Lower Middle Income Countries[77];
- Latin America (Region 8) with a specific scholarship allocation to the Lower Middle Income Countries[78] and a maximum allocation to Brazil/Mexico;
- South Africa (Region 10);
- African, Caribbean and Pacific countries (Region 11);and
- Gulf Cooperation countries (Region 12).

Applicants are encouraged to diversify the request of additional scholarships, thus covering the widest possible number of targeted regions.

[73] REGULATION (EU) No 233/2014 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 March 2014 establishing a financing instrument for development cooperation for the period 2014-2020: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2014:077:0044:0076:EN:PDF

[74] REGULATION (EU) No 232/2014 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 March 2014 establishing a European Neighbourhood Instrument: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2014:077:0027:0043:EN:PDF

[75] REGULATION (EU) No 234/2014 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 March 2014 establishing a Partnership Instrument for cooperation with third countries: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2014:077:0077:0084:EN:PDF

[76] Afghanistan, Bangladesh, Bhutan, Cambodia, Laos, Myanmar, Nepal

[77] Kyrgyzstan, Tajikistan, Uzbekistan

[78] Bolivia, El Salvador, Guatemala, Honduras, Nicaragua, Paraguay

**ADDITIONAL AWARD CRITERION**

Proposals which pass the minimum threshold under the award criterion "Relevance of the project" and obtain a total of at least 70 points (overall threshold for funding) will be assessed to receive additional scholarships for targeted regions against the following additional criterion.

| | |
|---|---|
| **Relevance of the project in the targeted region(s) (Yes/No)** | • The proposal describes the methods used to attract highly talented students from the targeted region(s)<br>• The proposal encourages cooperation with HEIs and /or other eligible participating organisation from Partner Countries in the targeted region(s). The added value of such co-operation to the EMJMD is clearly explained. |

## WHAT ELSE SHOULD YOU KNOW ABOUT THIS ACTION?

More compulsory criteria and additional useful information relating to this Action can be found in the Annex I of this Guide. The Annex includes:

- conditions relating to the design of the Erasmus Mundus Joint Master Degree;
- conditions relating to Master students;
- conditions relating to monitoring and quality assurance;
- selection procedure of EMJMD consortia.

Interested organisations are invited to read carefully the relevant sections of this Annex before applying for financial support.

**THE ERASMUS MUNDUS JOINT MASTER DEGREE CATALOGUE**

In order to contribute to the promotion, visibility and accessibility of the Erasmus+ student scholarships that will be offered by on-going EMJMDs, to the best Master students worldwide, EMJMDs will be included in an online catalogue hosted on the Executive Agency's website.

The EMJMD catalogue will advertise all the joint Master programmes offering Erasmus+ scholarships for the next academic year. The catalogue will allow potential students to select the EMJMDs of their choice and to apply for an Erasmus+ scholarship directly to the consortia concerned.

## WHAT ARE THE FUNDING RULES?

Selected EMJMDs will be supported through a grant agreement covering one preparatory year (if the applicant has opted to apply for the preparatory year) and four consecutive student intakes.

The EMJMD grant is calculated according to the following funding principles:

- a grant for the consortium management fees and the academic staff mobility;
- a variable number of student scholarships of 25 000 EUR maximum per year;
- a variable number of additional student scholarships of 25 000 EUR maximum per year for targeted regions of the world.

In detail, the budget of the EMJMD must be drafted according to the following funding rules (in euro):

A) Erasmus Mundus Joint Master Degree management:

| | |
|---|---|
| Contribution to the consortium management costs[79] and costs for invited scholars and guest lecturers | 20 000 EUR for the optional preparatory year. |
| | 50 000 EUR per intake of the EMJMD. |

B) Erasmus Mundus Joint Master Degree student scholarships:

The EMJMD student scholarships will include student participation costs (including the tuition fees, full insurance coverage and any other mandatory costs related to student participation in the course), a contribution to student travel and installation cost and a subsistence allowance for the entire duration of the EMJMD study programme. Details on the EMJMD student scholarship amounts are given in the table below:

| | |
|---|---|
| Contribution to the participation costs | up to 9 000 EUR per year per scholarship holder from a Partner Country[80]<br><br>up to 4 500 EUR per year per scholarship holder from a Programme Country<br><br>Any amount in excess of these maximum contributions must be covered by the participating organisations and cannot be charged to the scholarship holder. |
| Contribution to the travel and installation costs | 1 000 EUR per year per scholarship holder resident in a Programme Country for travel costs<br><br>2 000 EUR per year for travel costs + 1.000 EUR for installation costs for a scholarship holder, resident in a Partner Country less than 4000 KM from the EMJMD coordinating HEI.<br><br>3000 EUR per year for travel costs + 1.000 EUR for installation costs for a scholarship holder, resident in a Partner Country 4000 KM or more from the EMJMD coordinating HEI. |
| Contribution to subsistence costs | 1 000 EUR per month for the entire duration of the EMJMD study programme (24 months maximum). Contribution to subsistence costs will not be given to the scholarship holders for the EMJMD periods (study/research/placement/thesis preparation) spent in their country of residence, nor to scholarship holders from a Partner Country for the EMJMD periods exceeding one trimester (i.e. 3 months or the equivalent of 15 ECTS credits) spent in any Partner Country. |

**GRANT AWARD**

The actual amount of the individual scholarships, respectively the maximum grant amount awarded for selected projects, will depend on a number of elements:

a) the EMJMD length (60, 90 or 120 ECTS credits);
b) the EMJMD participation costs defined by the consortia
c) the implementation of the optional preparatory year;
d) the number of Programme/Partner country scholarships;

Based on these parameters, the EMJMD grant for the preparatory year and the four student intakes would amount to a maximum of 5.1 **million EUR**[81].

[79]Costs incurred by associated partners may be reimbursed by the EMJMD consortium only from the EU "contribution to the consortium's management costs" (lump sum).
[80] Students who are not residents nor have carried out their main activity (studies, training or work) for more than a total of 12 months over the last five years in a Programme Country. The five-year reference period for this 12-month rule is calculated backwards as from the submission deadline defined by the consortia of applying for a EMJMD student scholarship.
81 The theoretical maximum amount is obtained by applying the maximum rates for scholarships and assuming that a project would be awarded the maximum number of scholarships (e.g. 60 + 48) . Based on experience, the average grant amount is between 2.5 and 3.5 million EUR.

## ERASMUS+ MASTER LOANS

Higher education students who want to complete a full study programme at Master level in another Programme Country may be able to apply for an EU-guaranteed loan to contribute to their costs.

Erasmus+ Master Degree Loans enable potential Master's students to gain access to loans (provided by participating banks and guaranteed by the EU, via its partner the European Investment Fund) to support their studies abroad over the lifetime of the Erasmus+ Programme. The EU budget allocation will leverage a multiple amount in financing from the banking sector for loans to mobile masters students.

The scheme was launched in 2015 and Erasmus+ Master loans will become available incrementally in more countries and to more students over the years.

More information on the Scheme and the participating financial institutions is available on the website of the European Commission:https://ec.europa.eu/programmes/erasmus-plus/node/11_en

| | |
|---|---|
| Amounts and object of the loans | The loans are up to 12,000 EUR for a 1-year Master programme and up to 18,000 EUR for an up to 2-year Master and can cover living, tuition and other study costs in any of the 33 Erasmus+ Programme Countries.<br><br>Key social safeguards include no collateral by student or parents, favourable interest rate, favourable pay-back terms. |
| Eligibility criteria | To be eligible to apply students must:<br>- Be a resident of one of the Erasmus+ Programme Countries.<br>- Have successfully completed first cycle higher education studies (Bachelor or equivalent)<br>- Have been accepted for a 2nd cycle programme (Master or equivalent) at a recognised higher education institution (HEI) which holds the Erasmus Charter for Higher Education (ECHE).<br><br>The Master (or equivalent) that they intend to study must:<br>- Be delivered in a different country from their country of residence and from where they obtained their Bachelor degree (or the equivalent degree giving them access to the Master programme)<br>- Be a full programme that will lead to a (Master or equivalent) degree. |
| Where to apply? | Directly to participating banks, student loan companies |

# KEY ACTION 2: COOPERATION FOR INNOVATION AND THE EXCHANGE OF GOOD PRACTICES

## WHICH ACTIONS ARE SUPPORTED?

This Key Action supports:

- Strategic Partnerships in the field of education, training and youth;
- Knowledge Alliances;
- Sector Skills Alliances;
- Capacity Building in the field of higher education;
- Capacity Building in the field of youth.

The Actions supported under this Key Action are expected to bring positive and long-lasting effects on the participating organisations, on the policy systems in which such Actions are framed as well as on the organisations and persons directly or indirectly involved in the organised activities.

This Key Action is expected to result in the development, transfer and/or implementation of innovative practices at organisational, local, regional, national or European levels.

For the participating organisations, projects supported under this Key Action are intended to produce the following outcomes:

- innovative approaches for addressing their target groups, by providing for example: more attractive education and training programmes, in line with individual needs and expectations; use of participatory approaches and ICT-based methodologies; new or improved processes of recognition and validation of competences; greater effectiveness of activities for the benefit of local communities; new or improved practices to cater for the needs of disadvantaged groups and to deal with differences in learning outcomes linked to the geographical and socio-economic disparities; new approaches to address social, ethnic, linguistic and cultural diversity; new approaches to better support competitiveness and employment in particular at regional and local level; recognition of excellence in language learning or teaching through the European Language Label;

- a more modern, dynamic, committed and professional environment inside the organisation: ready to integrate good practices and new methods into daily activities; open to synergies with organisations active in different fields or in other socio-economic sectors; strategic planning of professional development for staff in line with individual needs and organisational objectives;

- increased capacity and professionalism to work at EU/international level: improved management competences and internationalisation strategies; reinforced cooperation with partners from other countries, other fields of education, training and youth and/or other socio-economic sectors; increased allocation of financial resources (other than EU funds) to organise EU/international projects in the field of education, training and youth; increased quality in the preparation, implementation, monitoring and follow-up of EU/international projects.

Projects funded under this Key Action are also likely to have a positive impact on the persons directly or indirectly involved in the activities, such as:

- increased sense of initiative and entrepreneurship;
- increased competence in foreign languages;
- increased level of digital competence;
- greater understanding and responsiveness to social, ethnic, linguistic and cultural diversity;
- improved levels of skills for employability and new business creation (including social entrepreneurship);
- more active participation in society;
- more positive attitude towards the European project and the EU values;
- better understanding and recognition of skills and qualifications in Europe and beyond;
- improved competences, linked to professional profiles (teaching, training, youth work, etc.);
- better understanding of practices, policies and systems in education, training or youth across countries;
- better understanding of interconnections between formal, non-formal education, vocational training, other forms of learning and labour market respectively;

- increased opportunities for professional development;
- increased motivation and satisfaction in daily work.

At systemic level, they are expected to trigger modernisation and reinforce the response of education and training systems and youth policies to the main challenges of today's world: employment, economic stability and growth, but also the need to promote social, civic and intercultural competences, intercultural dialogue, democratic values and fundamental rights, social inclusion, non-discrimination and active citizenship, critical thinking and media literacy.

Therefore, the impact of this Key Action is intended to be:

- increased quality of education and training and youth work in Europe and beyond: combining higher levels of excellence and attractiveness with increased opportunities for all, including those at disadvantage;
- education, training and youth systems that are better aligned to the needs of and opportunities offered by the labour market, and closer links to business and the community;
- improved provision and assessment of basic and transversal skills, particularly: entrepreneurship, social, civic, intercultural and language competences, critical thinking, digital skills and media literacy;
- increased synergies and links and improved transition between the different sectors of education, training and youth at national level, with improved use of European reference tools for recognition, validation and transparency of competences and qualifications;
- increased use of learning outcomes when describing and defining qualifications, parts of qualifications and curricula, in support to teaching and learning and in assessment;
- new and increased inter-regional and transnational cooperation of public authorities in the fields of education, training and youth;
- more strategic and integrated use of ICTs and open educational resources (OER) in education, training and youth systems;
- increased motivation for language learning through innovative teaching methods or better links to practical use of language skills required by the labour market;
- reinforced interaction between practice, research and policy.

# STRATEGIC PARTNERSHIPS IN THE FIELD OF EDUCATION, TRAINING AND YOUTH

## WHAT ARE THE AIMS AND PRIORITIES OF A STRATEGIC PARTNERSHIP?

Strategic Partnerships aim to support the development, transfer and/or implementation of innovative practices as well as the implementation of joint initiatives promoting cooperation, peer learning and exchanges of experience at European level.

Depending on the objectives and the composition of the Strategic Partnership, projects may be of two types:

- **Strategic Partnerships supporting innovation:**

Projects are expected to develop innovative outputs, and/or engage into intensive dissemination and exploitation activities of existing and newly produced products or innovative ideas. Applicants have the possibility to request a dedicated budget for Intellectual Outputs and Multiplier Events in order to directly answer to the innovation aspect of the Action. These types of projects are open to all fields of education, training and youth.

- **Strategic Partnerships supporting exchange of good practices**:

The primary goal is to allow organisations to develop and reinforce networks, increase their capacity to operate at transnational level, share and confront ideas, practices and methods. Selected projects may also produce tangible outputs and are expected to disseminate the results of their activities, although in a way that is proportional to the aim and scope of the project. These results and activities will be co-financed through the standard budget for project management and implementation. Strategic Partnerships relevant to the field of higher education will not support these types of projects. In addition, some specific Strategic Partnership formats may be realised under this type of partnerships:

  - **School Exchange Partnerships:** Only schools may participate in this type of Strategic Partnerships. The projects can use mobility opportunities for pupils and staff to help the participating schools develop as organisations and increase their ability to work in international projects.

  - **Transnational Youth Initiatives:** These Strategic Partnerships in the field of youth aim to foster social commitment and entrepreneurial spirit of young people. The distinctive feature of this format of Strategic Partnerships is that a Youth Initiative is initiated, set up and carried out by young people themselves.

More information about the characteristics of these specific project formats can be found under the section **"Specific Strategic Partnerships Formats"**

Irrespective from the field impacted by the project, Strategic Partnerships are open to any type of organisation active in any field of education, training and youth or other socio-economic sectors as well as to organisations carrying out activities that are transversal to different fields (e.g. local and regional authorities, recognition and validation centres, chambers of commerce, trade organisations, guidance centres, cultural organisations). Depending on the priority and the objectives addressed by the project, Strategic Partnerships should involve the most appropriate and diverse range of partners in order to benefit from their different experiences, profiles and specific expertise and to produce relevant and high quality project results.

To be funded, Strategic Partnerships must address either a) at least one horizontal priority or b) at least one specific priority relevant to the field of education, training and youth that is mostly impacted, as described below. Among these priorities, National Agencies may give more consideration to those that are particularly relevant in their national context ("European priorities in the national context"). National Agencies must duly inform potential applicants through their official websites.

### HORIZONTAL PRIORITIES

Development of relevant and high-quality skills and competences: supporting individuals in acquiring and developing basic skills and key competences, in order to foster employability and socio-educational and personal development, as well as participation in civic and social life. This priority will include, among others, actions to develop partnerships between learning institutions, businesses and intermediary bodies, with a view to promote lifelong learning and to improve the quality and effectiveness of learning mobility experiences. The Programme will also support actions that develop or disseminate tools for the assessment of such competences, as well as actions that apply "learning outcomes"-based approaches in education, training and youth activities or assess their quality, impact and relevance.

Social inclusion: priority will be given to actions that help address diversity and promote –in particular through innovative and integrated approaches– ownership of shared values, equality, including gender equality, and non-discrimination and social inclusion through education, training, youth and sport activities. The Programme will support projects that aim to: a) foster the development of social and civic and intercultural competences, media literacy, and critical thinking, and also tackle discrimination, segregation, racism, bullying and violence; b) enhance the access, participation and learning performance of disadvantaged learners, reducing disparities in learning outcomes; and c) support and assess new approaches to reducing disparities in access to and engagement with digital technologies in formal and non-formal education. Particular attention will be given to addressing gender differences in relation to ICT.

Open education and innovative practices in a digital era: priority will be given to actions that promote innovative methods and pedagogies, as well as participatory modes of governance, where appropriate. Another priority will be updating and developing digital learning materials and tools, in particular Open Educational Resources, open textbooks, and Free and Open Source Educational Software, as well as supporting the effective use of digital technologies and open pedagogies in education, training, youth and sport. This will include fostering synergies with research and innovation activities and promoting new technologies as drivers of improvements in education, training, youth and sport policies and practices. The Programme will also support new teaching methods and tools.

Educators: priority will be given to actions that strengthen the recruitment, selection and induction of the best and most suitable candidates for the teaching profession as well as to actions supporting the promotion of high-quality and innovative teaching in all educational sectors, training and youth work. The Programme will support the professional development of educators (such as teachers, professors, tutors, mentors, coaches, etc.) and youth workers, especially in dealing with early school leaving, learners with disadvantaged backgrounds, diversity in classrooms, use of new teaching methods and tools, and other contexts and work-based and informal learning.

Transparency and recognition of skills and qualifications: priority will be given to actions that support employability as well as learning and labour mobility and facilitate transitions between different levels and types of education and training, between education/training and the world of work, and between different jobs. Priority will be given to actions enabling and promoting recognition as well as transparency and comparability of qualifications and learning outcomes, including through the provision of better services and information/guidance on skills and qualifications. This includes promoting innovative solutions for the recognition and supporting the validation – at local, regional, national or European/international level – of competences acquired through informal and non-formal learning.

Sustainable investment, performance and efficiency: priority will be given to actions supporting the effective implementation of the Investment Plan for Europe, including by promoting funding models attracting private actors and capital (incl. under the Erasmus+ Student Loan Guarantee Facility), as well as supporting the design of evidence-based reforms that deliver quality, innovation and relevance in education, training, youth and sport systems and policies. Priority will also be given to actions supporting the development of innovative ways to ensure sustainable investment in all forms of learning, both formal and non-formal, including performance-based funding and cost-sharing.

Social and educational value of European cultural heritage, its contribution to job creation, economic growth and social cohesion. In the context of the European Year of Cultural Heritage 2018 , priority will be given to actions contributing to raising awareness of the importance of Europe's cultural heritage through education, life-long learning, informal and non-formal learning, youth as well as sport, including actions to support skills development, social inclusion, critical thinking and youth engagement. New participatory and intercultural approaches to heritage, as well as educational initiatives aimed at fostering intercultural dialogue involving teachers and pupils from an early age will be promoted.

#### FIELD-SPECIFIC PRIORITIES

In the field of higher education, priority will be given to the following actions, in line with the challenges identified in the renewed EU Agenda for the Modernisation of Higher Education:

- Tackling skills gaps and mismatches through: a) activities to increase the uptake of subjects where skills shortages exist and improve career guidance, and b) designing and developing curricula that meet the learning needs of students that are relevant to the labour market and societal needs, including through better use of open and online, blended, work-based, multi-disciplinary learning and new assessment models. Reinforcing cooperation between higher education institutions, VET organisations and employers or social enterprises on real-world problems, for example by fostering collaboration between students, apprentices and enterprises on entrepreneurial and trans-disciplinary projects and by facilitating business field trips;
- With a view to the priority above, supporting the further development of graduate tracking systems in Programme countries and exploring options for improving the availability of comparable data on graduate outcomes within Europe;

- Encouraging training and exchange to enhance the quality of teaching, in particular, supporting the use of digital technologies and online delivery to improve pedagogies and assessment methods; setting up transnational teacher training courses and strengthening cooperation between teacher training centres;
- Promoting and rewarding excellence in teaching and skills development, including through developing effective incentive structures and human resources policies at national and institutional levels, training of academics in new and innovative pedagogical approaches, new curriculum design approaches and sharing of good practices through collaborative platforms;
- Building inclusive higher education systems, connected to surrounding communities, by: a) developing and implementing holistic institutional strategies for inclusion and study success, increasing fairness in access and the participation and completion rates of under-represented and disadvantaged groups, including through relevant post-entry support, guidance, counselling and mentoring of students; b) improving pathways between schools, VET, research institutes and higher education through multi-sector international educational partnerships; c) developing, testing and implementing flexible and modular course design (part-time, online or blended) in particular to better adapt to the needs of mature students and early stage researchers; d) promoting the civic and social responsibility of students, researchers and universities and recognising voluntary and community work in academic results (through ECTS points, for example).
- Ensuring higher education institutions and research institutes contribute to innovation by: a) developing, implementing and testing the effectiveness of approaches to promote creativity, entrepreneurial thinking and skills for applying innovative ideas in practice; b) ensuring education and research are mutually reinforcing, including through partnerships and inter- and trans-disciplinary approaches, and through strengthening the role of higher education institutions and research institutes in their local and regional environments; c) supporting the transfer of latest research outputs back into education as input for teaching and encouraging undergraduates and master students to get involved in opportunities to help them explore contemporary research problems and develop their research skills to become a researcher.
- Fostering effective and efficient system-level funding and governance models, rewarding good teaching, innovation and community-relevance;
- Promoting internationalisation, recognition and mobility, supporting changes in line with Bologna principles and tools. Cooperation projects of universities, research institutes, university networks and possibly private or non-profit actors to implement mobility activities under the Erasmus+ Student Loan Guarantee Facility may be considered.

In the field of school education, priority will be given to:

- Strengthening the profile(s) of the teaching professions, including teachers, school leaders and teacher educators, through actions with the following objectives: making careers more attractive; strengthening selection and recruitment; enhancing teachers' professional development and linking its different phases in a continuum from Initial Teacher Education and induction to continuing professional development; supporting teachers in dealing with diversity in the classroom (including pupils with a migrant background); supporting teachers in adopting collaborative and innovative practices, both digital and non-digital, and new assessment methods; strengthening leadership in education, including the role and profile of school leaders, distributed leadership at school and teacher leadership.

- Promoting the acquisition of skills and key competences, for example by: addressing underachievement in maths, science and literacy through effective and innovative teaching and assessment; promoting entrepreneurship education; mainstreaming digital competence provision across the curricula, tailored to specific age groups; fostering critical thinking especially through teaching science in environmental and/or cultural context; adopting a holistic approach to language teaching and learning, building on the diversity found in today's increasingly multilingual classrooms.

- Supporting schools to tackle early school leaving (ESL) and disadvantage and to offer quality education, enabling success for all students, from the lowest to the highest end of the academic spectrum, including children with a migrant background who might face specific (e.g. linguistic) challenges; strengthening collaboration among all actors within schools, as well as with families, and other external stakeholders; improving transition between different stages of education; supporting networking by schools which promote collaborative and holistic approaches to teaching and learning; improving evaluation and quality assurance.

- Supporting efforts to increase access to affordable and high quality early childhood education and care (ECEC). Enhancing the quality of ECEC systems and provisions in order to foster age appropriate development of children, to achieve better learning outcomes and ensure a good start in education for all, in particular through taking the EU ECEC quality framework further, as well as ensuring that the benefits of early childhood education are carried through to other school education levels, and projects that develop new models of implementation, governance and funding for ECEC.

In the field of vocational education and training (VET), priority will be given to:

- Developing institutional partnerships supporting the set up and implementation of an internationalisation strategy of VET learners and apprentices, aimed at putting in place the necessary support infrastructure as well as the relevant institutional and/or contractual frameworks to promote quality mobility work placements of VET learners and apprentices in another country. The specific rules and information relating to VET learner mobility activities, as described in Annex I of the Programme guide, should be applied;

- Developing partnerships aimed at promoting work-based learning in all its forms, e.g. the development of new training content (including Joint VET qualifications), integrating periods of work-based learning, including opportunities to apply knowledge in practical projects/"real life" workplace situations, and embedding international experience (mobility) whenever possible;

- In view of increasing the quality of VET provision, the establishment of feedback loops to adapt VET provision based on outcomes, including by setting up or testing graduate tracking arrangements as part of quality assurance systems in line with the recommendation on the European Framework for Quality Assurance in Vocational Education and Training (EQAVET);

- Further strengthening key competences in initial and continuing VET (especially literacy, numeracy and digital) including common methodologies for introducing those competences in curricula, as well as for acquiring, delivering and assessing the learning outcomes of those curricula; enhancing access to training and qualifications for all, with a particular attention to the low-skilled, through continuing VET, notably by increasing quality, supply and accessibility of continuing VET, validation of non-formal and informal learning, promoting work-place learning, providing for efficient and integrated guidance services and flexible and permeable learning pathways;

- Introducing systematic approaches to, and opportunities for, the initial and continuous professional development of VET teachers, trainers and mentors in both school and work-based settings, with a focus on developing effective digital, open and innovative education and pedagogies.

In the field of adult education, priority will be given to:

In the field of adult education, in line with the ET2020/European Agenda for Adult Learning priorities and the Council recommendation on Upskilling Pathways: New Opportunities for Adults , priority will be given to:

- Improving and extending the supply of high quality learning opportunities tailored to the needs of individual low-skilled or low-qualified adults so that they enhance their literacy, numeracy and digital competences, key competences and/or progress towards higher qualifications, including through the validation of skills acquired through informal and non-formal learning, or progress towards higher qualifications;
- Facilitating access to upskilling pathways by making available skills identification and screening, learning offers adapted to individual learning needs, and through the validation of skills acquired through informal and non-formal learning;
- Increasing demand and take-up through effective outreach, guidance and motivation strategies which encourage low-skilled or low-qualified adults, to develop and upgrade their literacy, numeracy and digital competences and skills and/or progress towards higher qualifications;
- Extending and developing educators' competences, particularly in the effective teaching of literacy, numeracy and digital skills to low-skilled or low-qualified adults, including through the effective use of ICT;
- Developing mechanisms to monitor the effectiveness of adult learning policies or to track and monitor the progress of adult learners.

In the field of youth, priority will be given to:

- Promoting quality youth work. Priority will be placed on projects that:

    - Support the capacity building of youth workers and in youth work;
    - Support youth workers in developing and sharing effective methods in reaching out to marginalised young people, in preventing racism and intolerance among youth, and in addressing the risks, opportunities, and implications of digitalisation;
    - Foster the inclusion and employability of young people with fewer opportunities (including NEETs), with particular emphasis in young people at risk of marginalisation and those with a migrant background, including newly arrived immigrants and young refugees;

- Promote intercultural dialogue and strengthen knowledge and acceptance of diversity in society;
- Open up youth work to cross-sectorial cooperation allowing greater synergies across all fields of actions concerning young people;
- Ease transition of young people from youth to adulthood, in particular the integration into the labour market; develop their competences, setting quality standards, ethical and professional codes;
- Reinforce links between policy, research and practice; promote better knowledge about the situation of young people and youth policies, recognition and validation of youth work and informal non-formal learning at European, national, regional and local levels.

- Promoting empowerment. Priority will be given to projects that strengthen cross-sectorial cooperation, allowing for greater synergies across all fields of actions concerning young people, with a special focus on access to rights, autonomy, participation –including e-participation– and the active citizenship of young people, notably those at risk of social exclusion, through projects that:

  - Foster stronger participation of all young people in democratic and civic life in Europe, including in connection with the 2019 European elections;
  - Broaden and deepen political and social participation of young people at local, regional, national, European or global level;
  - Foster volunteering among young people;
  - Increase social inclusion of all young people, taking into account the underlying European values;
  - Promote diversity, intercultural and inter-religious dialogue, as well as the common values of freedom, tolerance and respect of human, social and economic rights;
  - Enhance critical thinking and media literacy among young people;
  - Strengthen young people's sense of initiative, notably in the social field;
  - Enable young people to connect with, express their opinions to and influence elected policy-makers, public administrations, interest groups, civil society organisations, or individual citizens within any of the political or social processes affecting their lives.

- Promoting entrepreneurship education, social entrepreneurship and not-for-profit activities among young people. Priority will be placed on projects in the form of transnational youth initiatives that allow groups of young people to put ideas into practice, including through social enterprises, tackling challenges and identified problems in their daily lives.

### WHAT ARE THE ACTIVITIES SUPPORTED IN A STRATEGIC PARTNERSHIP?

Over the lifetime of a project, and depending on the type of Strategic Partnership, projects may typically realise a broad range of activities, for example:

- activities that strengthen the cooperation and networking between organisations;
- testing and/or implementation of **innovative practices** in the field of education, training and youth;
- activities that facilitate the **recognition and validation of knowledge, skills and competences** acquired through formal, non-formal and informal learning;
- activities of **cooperation between regional authorities** to promote the development of education, training and youth systems and their integration in actions of local and regional development;
- activities to support learners with **disabilities/special needs** to complete education cycles and facilitate their transition into the labour market, including by combating **segregation and discrimination** in education for marginalised communities;
- activities to better prepare and deploy the education and training of professionals for **equity, diversity and inclusion** challenges in the learning environment;
- activities to promote the integration of refugees, asylum seekers and newly arrived migrants and raise awareness about the refugee crisis in Europe;
- transnational initiatives fostering entrepreneurial mind-sets and skills, to encourage **active citizenship and entrepreneurship (including social entrepreneurship),** jointly carried out by two or more groups of young people from different countries.

Strategic Partnerships may also organise transnational **learning, teaching and training activities** of individuals, in so far as they bring added value in the achievement of the project's objectives. Some of these activities are particularly relevant in one or more fields of education, training and youth, as stated in the table below. For a more detailed description of the supported activities, see Annex I.

| Type of activity | Particularly relevant for |
|---|---|
| Blended mobility of learners | All fields of education, training and youth |
| Short-term exchanges of groups of pupils | School education |
| Intensive Study Programmes | Higher education |
| Long-term study mobility of pupils | School education |
| Long-term teaching or training assignments | Higher education, VET, School and Adult education |
| Long-term mobility of youth workers | Youth |
| Short-term joint staff training events | All fields of education, training and youth |

### WHO CAN TAKE PART IN A STRATEGIC PARTNERSHIP?

As a general rule, Strategic Partnerships target the cooperation between organisations established in Programme Countries. However, organisations from Partner Countries can be involved in a Strategic Partnership, as partners (not as applicants), if their participation brings an essential added value to the project.

In addition to the organisations formally participating in the project and receiving EU funds, Strategic Partnerships may also involve associated partners from the public or private sector who contribute to the implementation of specific project tasks/activities or support the dissemination and sustainability of the project. For contractual management issues, associated partners are not considered as part of the project partners, and they do not receive funding. However, their involvement and role in the project and different activities have to be clearly described.

### WHAT ARE THE CRITERIA USED TO ASSESS A STRATEGIC PARTNERSHIP?

Here below are listed the formal criteria that a Strategic Partnership must respect in order to be eligible for an Erasmus+ grant:

**GENERAL ELIGIBILITY CRITERIA**

| | |
|---|---|
| **Eligible participating organisations** | A participating organisation can be any public or private organisation, established in a Programme Country or in any Partner Country of the world (see section "Eligible Countries" in Part A of this Guide).<br><br>For example, such organisation can be:<br>▪ a higher education institution;<br>▪ a school/institute/educational centre (at any level, from pre-school to upper secondary education, and including vocational education and adult education);<br>▪ a non-profit organisation, association, NGO;<br>▪ a public or private, a small, medium or large enterprise (including social enterprises);<br>▪ a public body at local, regional or national level;<br>▪ a social partner or other representative of working life, including chambers of commerce, industry, craft/professional associations and trade unions;<br>▪ a research institute;<br>▪ a foundation;<br>▪ an inter-company training centre;<br>▪ enterprises providing shared training (collaborative training);<br>▪ a cultural organisation, library, museum;<br>▪ a body providing career guidance, professional counselling and information services;<br>▪ a body validating knowledge, skills and competences acquired through non-formal and informal learning;<br>▪ a European Youth NGO;<br>▪ a group of young people active in youth work but not necessarily in the context of a youth organisation (i.e. informal group of young people[82]).<br><br>Higher education institutions (HEIs) established in a Programme Country must hold a valid Erasmus Charter for Higher Education (ECHE). An ECHE is not required for participating HEIs in Partner Countries, but they will have to sign up to its principles. |
| **Who can apply?** | Any participating organisation established in a Programme Country can be the applicant. This organisation applies on behalf of all participating organisations involved in the project. |
| **Number and profile of participating organisations** | A Strategic Partnership is transnational and involves minimum three organisations from three different Programme Countries. There is no maximum number of participating organisations. However, the budget for project management and implementation is capped (and equivalent to 10 participating organisations). All participating organisations must be identified at the time of applying for a grant.<br><br>Exceptionally, different rules apply for the following Strategic Partnerships:<br>▪ **Strategic Partnerships in the youth field** must involve minimum two organisations from two different Programme Countries;<br>▪ **School Exchange Partnerships** must involve a minimum of two and a maximum of six schools from at least two different Programme countries[83]. |

[82] In case of an informal group, one of the members of the group assumes the role of representative and takes responsibility on behalf of the group.

[83] Depending on the country where the school is registered, a specific definition of eligible schools applies for this type of partnerships. The definition and/or a list of eligible schools is published on the website of each National Agency. In addition, please note that the contracting model for School Exchange Partnerships differs from other Strategic Partnerships and is based on monobeneficiary Grant Agreements. For further details, please refer to Part C of this Guide or contact your National Agency.

| | |
|---|---|
| **Venue(s) of the activities** | All the activities of a Strategic Partnership must take place in the countries of the organisations participating in the project. Learning, teaching and training activities for learners and long-term activities for staff can only be organised in Programme Countries<br><br>In addition, if duly justified in relation to the objectives or implementation of the project:<br><br>• Activities can also take place at the seat of an Institution of the European Union, even if in the project there are no participating organisations from the country that hosts the Institution[84],<br>• Multiplier events can be hosted in the country of any of the associated partners involved in the Strategic Partnership. |
| **Duration of project** | ▪ **Partnerships in the field of higher education:** between 24 and 36 months;<br>▪ **Partnerships in the field of VET, school education and adult education:** between 12 and 36 months[85];<br>▪ **Partnerships in the youth field:** between 6 and 36 months.<br><br>The duration has to be chosen at application stage, based on the objective of the project and on the type of activities planned over time.<br><br>In exceptional cases, the duration of a Strategic Partnership may be extended, upon request by the beneficiary and with the agreement of the National Agency, of up to 6 months and provided that the total duration does not exceed 3 years. In such a case, the total grant will not change. In all cases, projects must end not later than 31 August 2021. |
| **Where to apply?** | To the National Agency of the country in which the applicant organisation is established[86].<br><br>Per deadline, the same consortium of partners can submit only one application and to one National Agency only. |
| **When to apply?** | ▪ **Partnerships in the fields of Higher Education, VET, School and Adult education:**<br>▪ applicants have to submit their grant application **by 21 March at 12:00 (midday Brussels time)** for projects starting between 1 September and 31 December of the same year.<br><br>▪ **Partnerships in the youth field:**<br>applicants have to submit their grant application by:<br><br>▪ **1 February at 12:00 (midday Brussels time)** for projects starting between 1 June and 30 September of the same year;<br>▪ **26 April at 12:00 (midday Brussels time)** for projects starting between 1 September of the same year and 31 January of the following year;<br>▪ **4 October at 12:00 (midday Brussels time)** for projects starting between 1 February and 31 May of the following year.<br><br>For Strategic Partnerships in the youth field: for each of the three deadlines, National Agencies may open the deadline to both types of Strategic Partnerships (i.e. supporting innovation and supporting exchanges of good practices) or only to one type of projects. Applicants are invited to check the website of their National Agency for more precise information. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

84 Seats of the Institutions of the European Union are Brussels, Frankfurt, Luxembourg, Strasbourg, and The Hague.
85 For the specific format "School Exchange Partnerships" additional criteria apply. Please see section "School Exchange Partnerships".
86 Please note: schools under the supervision of national authorities of another country (e.g. Lycée français, German schools, UK "Forces" schools) apply to the NA of the supervising country.

**ADDITIONAL ELIGIBILITY CRITERIA**

In addition, if the Strategic Partnership foresees any of the following transnational learning, teaching and training activities, the relevant additional eligibility criteria must be respected:

**Short-term joint staff training events**.

| | |
|---|---|
| **Eligible participants** | Professors, teachers, trainers, educational and administrative staff[87] working in participating organisations in Programme and Partner Countries. Youth workers from Programme and Partner Countries. |
| **Duration of activity** | 3 days to 2 months; excluding travel days |

**Intensive Study Programmes**

| | |
|---|---|
| **Eligible participants** | - Learners: Higher education students enrolled in a participating HEI in a Programme Country.<br>- Teaching staff: teaching staff from participating HEIs in Programme or Partner Countries.<br>- Invited teachers: teaching staff from non-participating HEIs, and experts/specialists/professionals from enterprises or other organisations in Programme or Partner Countries. |
| **Duration of activity** | - Learners: 5 days to 2 months; excluding travel days<br>- Teaching staff (including invited teachers): 1 day to 2 months; excluding travel days |

**Blended mobility of pupils, learners and young people (short-term physical mobility combined with virtual mobility)**

| | |
|---|---|
| **Eligible participants** | Apprentices, VET learners, higher education students[88], adult learners, and pupils from participating organisations in Programme Countries. Young people from Programme Countries. |
| **Duration of activity** | 5 days to 2 months; excluding travel days |

**Short-term exchanges of groups of pupils**

| | |
|---|---|
| **Eligible participants** | Pupils of any age enrolled in a participating school in a Programme Country and accompanied by school staff. |
| **Duration of activity** | 3 days to 2 months; excluding travel days |

**Long-term teaching or training assignments**

| | |
|---|---|
| **Eligible participants** | Professors, teachers, trainers, educational and administrative staff working in the participating organisations in Programme Countries. |
| **Duration of activity** | 2 to 12 months |

**Long-term study mobility of pupils**

| | |
|---|---|
| **Eligible participants** | Pupils aged 14 or older, enrolled at a participating school in a Programme Country. |
| **Duration of activity** | 2 to 12 months |

**Long-term mobility of youth workers**

| | |
|---|---|
| **Eligible participants** | Youth workers from Programme Countries. |
| **Duration of activity** | 2 to 12 months |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

[87] In the school education field, this includes educational staff intervening in schools, such as school inspectors, school counsellors, pedagogical advisors, psychologists, etc.

[88] Higher education students must be registered in a participating HEI and enrolled in studies leading to a recognised degree or other recognised tertiary level qualification, up to and including the level of doctorate.

**AWARD CRITERIA**

Depending on the objectives of the project, the participating organisations involved, the expected impact, and other elements, Strategic Partnerships can be of different sizes, and adapt their activities accordingly. In simplified terms, this action enables participating organisations to gain experience in international cooperation and to strengthen their capacities, but also to produce high-quality innovative deliverables. The qualitative assessment of the project will be proportional to the objectives of the cooperation and the nature of the organisations involved.

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives and the priorities of the Action (see section "What are the aims and priorities of a Strategic Partnership").<br>- If the proposal addresses the horizontal priority "inclusive education, training, and youth", it will be considered as highly relevant.<br>- If the proposal addresses one or more "European Priorities in the national context", as announced by the National Agency, it will be considered as highly relevant.<br>▪ The extent to which:<br>- the proposal is based on a genuine and adequate needs analysis;<br>- the objectives are clearly defined, realistic and address issues relevant to the participating organisations and target groups;<br>- the proposal is suitable of realising synergies between different fields of education, training and youth;<br>- the proposal is innovative and/or complementary to other initiatives already carried out by the participating organisations;<br>- the proposal brings added value at EU level through results that would not be attained by activities carried out in a single country. |
| **Quality of the project design and implementation (maximum 20 points)** | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, monitoring, evaluation and dissemination;<br>▪ The consistency between project objectives and activities proposed;<br>▪ The quality and feasibility of the methodology proposed;<br>▪ The existence and relevance of quality control measures to ensure that the project implementation is of high quality, completed in time and on budget;<br>▪ The extent to which the project is cost-effective and allocates appropriate resources to each activity.<br>▪ If applicable, the use of Erasmus+ online platforms (i.e. eTwinning; EPALE; School Education Gateway) as tools for preparation, implementation and follow-up of the project activities.<br>If the project plans training, teaching or learning activities:<br>▪ The quality of practical arrangements, management and support modalities in learning, teaching and training activities;<br>▪ The extent to which these activities are appropriate to the project's aims and involve the appropriate number of participants;<br>▪ The quality of arrangements for the recognition and validation of participants' learning outcomes, in line with European transparency and recognition tools and principles. |

| | |
|---|---|
| **Quality of the project team and the cooperation arrangements (maximum 20 points)** | • The extent to which:<br>- the project involves an appropriate mix of complementary participating organisations with the necessary profile, experience and expertise to successfully deliver all aspects of the project;<br>- the distribution of responsibilities and tasks demonstrates the commitment and active contribution of all participating organisations;<br>- if relevant for the project type, the project involves participation of organisations from different fields of education, training, youth and other socio-economic sectors.<br>• The extent to which the project involves newcomers to the Action.<br>• The existence of effective mechanisms for coordination and communication between the participating organisations, as well as with other relevant stakeholders.<br>• If applicable, the extent to which the involvement of a participating organisation from a Partner Country brings an essential added value to the project (if this condition is not fulfilled, the project will not be considered for selection). |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the project.<br>▪ The potential impact of the project:<br>- on participants and participating organisations, during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at local, regional, national and/or European levels.<br>▪ The quality of the dissemination plan: the appropriateness and quality of measures aimed at sharing the outcomes of the project within and outside the participating organisations;<br>▪ If relevant, the extent to which the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limitations;<br>▪ The quality of the plans for ensuring the sustainability of the project: its capacity to continue having an impact and producing results after the EU grant has been used up. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 15 points for the categories "relevance of the project" and "impact and dissemination"; 10 points for the categories "quality of the project design and implementation" and "quality of the project team and the cooperation arrangements"). Proposals that do not address at least one priority of the Action will not be funded.

## SPECIFIC STRATEGIC PARTNERSHIP FORMATS

Strategic Partnerships support a wide and flexible range of activities in order to implement high-quality projects, promote development and modernisation of organisations, and support policy developments at European, national and regional level.

Depending on the objectives of the project, the participating organisations involved, the expected impact, and other elements, Strategic Partnerships can be of different sizes, and adapt their activities accordingly.

Among the great variety of activities and project formats, the following Strategic Partnerships have specific characteristics.

## SCHOOL EXCHANGE PARTNERSHIPS

The main goal of School Exchange Partnerships is to strengthen the European dimension in the participating schools, to build up their capacity for cross-border cooperation and their ability to cope with new challenges. By organising mobility activities for pupils, these partnerships will also promote the values of inclusion and tolerance as underlined in the Paris Declaration.

School Exchange Partnerships can implement different activities for exchange of staff and pupils:

- **Short-term exchanges of groups of pupils (3 days to 2 months):** pupils from different countries can work together in activities linked to the aims of the partnership. The short-term exchange activities are designed to offer international learning experiences to pupils, to develop their understanding of the diversity of European cultures and languages, and to help them acquire social, civic and intercultural competences necessary for their personal development.
- **Long-term study mobility of pupils (2 to 12 months):** pupils aged at least 14 may spend a period in a receiving school and a host family abroad. The sending and hosting schools are expected to ensure high quality learning outcomes, to provide appropriate recognition for the involved pupils, and to constantly support them during their mobility period. Applicants for School Exchange Partnerships may focus entirely on organisation of long-term pupil mobility as a tool to develop the international cooperation potential of the involved schools.
- **Short-term joint staff training events (3 days to 2 months)**: teaching and non-teaching staff can work together to exchange experience and know-how, or receive joint training.
- **Long-term teaching or training assignments (2 to 12 months):** through a longer posting in a partner school, this activity allows staff to develop their knowledge and understanding of other countries' education and training systems, and helps them share and acquire professional competences, methods and practices.

Participating schools in all projects are strongly encouraged to use the eTwinning online platform to work together on the project before, during and after the mobility activities.

### SPECIFIC ELIGIBILITY CRITERIA APPLYING TO SCHOOL EXCHANGE PARTNERSHIPS

Compared to other Strategic Partnerships, the following specific rules will apply to this format:

- Partnerships must involve a minimum of two and a maximum of six schools[89];
- Only schools from Programme Countries can participate;
- As a general rule, projects will last between 12 and 24 months. If justified by their workplan, only projects organising long-term mobility of pupils may last up to 36 months;
- Funds are provided for mobility activities of staff and pupils (including accompanying teachers or other qualified persons), as well as general project management and implementation costs. Dedicated funding is not provided for Intellectual Outputs, Multiplier Events and Transnational Project Meetings. Additional funds for support to participants with special needs, as well as Exceptional costs may be requested, if justified. For details, please consult the section "What are the funding rules?", below;
- Funding will be limited to a maximum of 16 500 EUR per year and per participating school. Funds for support to participants with special needs, as well as Exceptional costs for expensive travel will not count towards this cap.

Successful School Exchange Partnerships will use a specific contracting model compared to other Strategic Partnerships. At application stage, the applicant school takes the lead of the project and applies on behalf of all the participating schools. However, once the partnership is selected, each participating school will sign a separate grant agreement with the National Agency established in its country. The applicant school remains in a coordinating role for the duration of the project and will be responsible for reporting on the project's overall results, while the partner schools report only on their specific expenses.

[89] Depending on the country where the school is registered, a specific definition of eligible schools applies for this type of partnerships. The definition and/or a list of eligible schools is published on the website of each National Agency. For further details, please refer to Part C of this Guide or contact your National Agency.

## TRANSNATIONAL YOUTH INITIATIVES[90]

These Strategic Partnerships in the field of youth aim to foster social commitment and entrepreneurial spirit of young people. For example, these initiatives may concern:

- the establishment of (networks of) social enterprises, associations, clubs, NGOs,
- the development and delivery of courses and trainings on entrepreneurship education (notably social entrepreneurship and use of ICTs;
- information, media literacy, sensitization actions, or actions stimulating civic commitment among young people (e.g. debates, conferences, events, consultations, initiatives around European topics, etc.);
- actions for the benefit of the local communities (e.g. support to vulnerable groups such as elderly people, minorities, migrants, disabled, etc.);
- artistic and cultural initiatives (theatre plays, exhibitions, music performances, discussion fora, etc.).

The distinctive feature of this format of Strategic Partnerships is that a Youth Initiative is initiated, set up and carried out by young people themselves.

### WHAT ELSE SHOULD YOU KNOW ABOUT THIS ACTION?

#### SUPPORTING REGIONAL COOPERATION IN SCHOOL EDUCATION

Strategic Partnerships in the field of school education have an opportunity to apply for projects based around cross-border cooperation between regions or municipalities from different countries. The distinctive aspect of these partnerships is the strategic involvement of local and/or regional school authorities. To create a successful application, the local or regional authorities should take a lead role in the planning of activities addressing a shared issue through involvement of organisations from the civil and private sectors together with schools in their community.

#### EXCEPTIONAL COSTS

Applicants of Strategic Partnerships organising learning, teaching and training activities will be allowed to claim financial under the budget heading "exceptional costs" (up to a maximum of 80% of total eligible costs: see "What are the funding rules?"). This would be allowed provided that applicants can justify that the standard funding rules (based on contribution to unit costs per travel distance band) do not cover at least 70% of the travel costs of participants.

#### OTHER INFORMATION

In addition to the information provided above, more compulsory criteria and additional useful information, as well as project examples relating to this Action can be found in the **Annex I of this Guide**. Interested organisations are invited to read carefully the relevant sections of this Annex before applying for financial support.

### WHAT ARE THE FUNDING RULES?

Strategic Partnerships will range from fairly simple cooperation projects between small scale organisations (like schools or informal groups of young people) to rather sophisticated and large-scale projects focusing on the development and exchange of innovative outputs in all fields of education, training and youth. The expenses incurred by the different types of projects will necessarily vary accordingly.

By consequence, the proposed funding model consists of a menu of cost items from which applicants will choose according to the activities they want to undertake and the results they want to achieve. The first item, "project management and implementation" is a cost item that all types of Strategic Partnerships may apply for, as they are meant to contribute to costs that any project will incur. With the exception of School Exchange Partnerships, Strategic Partnerships may also apply for

[90] Project promoters applying for Transnational Youth Initiatives should apply under Strategic Partnerships supporting exchanges of good practices.

specific funding to organise "transnational project meetings". The other cost items can only be chosen by projects that will pursue more substantial objectives in terms of intellectual outputs/products, dissemination or embedded teaching, training and learning activities. Additionally, if justified by the project activities/outputs, exceptional costs and costs for participation of persons with special needs can be covered.

The total project grant is a variable amount, defined by multiplying 12 500 EUR by the duration of the project (in months), and capped at 450 000 EUR for projects with duration of 36 months. Exceptionally, for School Exchange Partnerships a ceiling of 16 500 EUR per year and per participating school will apply. Funds for support to participants with special needs, as well as Exceptional costs covering high travel costs will not count towards the funding cap for School Exchange Partnerships.

The budget of the project must be drafted according to the following funding rules (in euro):

**Maximum grant awarded:**

a variable amount, defined by multiplying **12 500 EUR** by the duration of the project (in months) and up to **450 000 EUR** for projects with duration of 36 months;

(Exception: for School Exchange Partnerships: a maximum of **16 500 EUR** per year and per participating school, excluding Special Needs Support and Exceptional costs for expensive travel)

Some of the maxima amounts indicated in the tables above are capped per month and are calculated following a pro-rata approach, so that the grant awarded divided by the number of months results in a maximum of 12 500 EUR. However, the beneficiaries can use-up the total EU grant received for the project in the most flexible way, throughout its duration and according to the way the activities need to be implemented chronologically in the work plan.

| Eligible costs | | Financing mechanism | Amount | | Rule of allocation |
|---|---|---|---|---|---|
| **Project management and implementation** | Project management (e.g. planning, finances, coordination and communication between partners, etc.); small scale learning/teaching/training materials, tools, approaches etc. Virtual cooperation and local project activities (e.g. class-room project work with learners, youth work activities, organisation and mentoring of embedded learning/training activities, etc.); information, promotion and dissemination (e.g. brochures, leaflets, web information, etc.).<br>Costs linked to the implementation of Transnational Youth Initiatives and School Exchange Partnerships. | Contribution to unit costs | Contribution to the activities of the coordinating organisation:<br><br>**500 EUR** per month | Maximum **2750 EUR** per month | Based on the duration of the Strategic Partnership and on the number of participating organisations involved |
| | | Contribution to unit costs | Contribution to the activities of the other participating organisations:<br><br>**250 EUR** per organisation per month | | |

| | | | | |
|---|---|---|---|---|
| **Transnational project meetings** | Participation in meetings between project partners for implementation and coordination purposes.<br>Contribution to travel and subsistence costs<br>This budget item is not available for School Exchange Partnerships. | Contribution to unit costs | For travel distances between 100 and 1999KM:<br>**575 EUR** per participant per meeting<br><br>For travel distances of 2000 KM or more:<br>**760 EUR** per participant per meeting | Conditional: applicants must justify the need for the meetings in terms of number of meetings and participants involved. Travel distances must be calculated using the distance calculator supported by the European Commission. |

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Exceptional costs** | Contribution to real costs related to subcontracting or purchase of goods and services.<br>Costs for providing a financial guarantee, if the National Agency asks for it. | Real costs | 75% of eligible costs<br>Maximum of **50.000 EUR** per project (excluding costs for providing a financial guarantee) | Conditional: subcontracting has to be related to services that cannot be provided directly by the participating organisations for duly justified reasons. Equipment cannot concern normal office equipment or equipment normally used by the participating organisations. |
| **Special needs support** | Additional costs directly related to participants with disabilities[91] | Real costs | 100% of eligible costs | Conditional: the request for these costs must be motivated in the application form. |
| **ADDITIONAL FUNDING FOR STRATEGIC PARTNERSHIPS SUPPORTING INNOVATION IN THE FIELD OF EDUCATION, TRAINING AND YOUTH** | | | | |
| **Intellectual outputs** | Intellectual outputs/tangible deliverables of the project (such as curricula, pedagogical and youth work materials, open educational resources (OER), IT tools, analyses, studies, peer-learning methods, etc.) | Contribution to unit costs | **B1.1** per manager per day of work on the project<br><br>**B1.2** per researcher/ teacher /trainer/youth worker per day of work on the project<br><br>**B1.3** per technician per day of work on the project | Conditional: staff costs for managers and administrative staff are expected to be covered already under "Project management and implementation". To prevent potential overlap with such item, applicants will have to justify the type and volume of staff costs applied for in relation to each output proposed. |

[91] Including costs directly related to participants with special needs and accompanying persons taking part in transnational learning, teaching and training activities. This may include costs related to travel and subsistence, if justified and as long as a grant for these participants is not requested through budget categories "travel" and "individual support").

| | | | | | |
|---|---|---|---|---|---|
| | | | **B1.4** per administrative staff per day of work on the project | | The outputs should be substantial in quality and quantity to qualify for this type of grant support. The outputs should prove their potential for wider use and exploitation, as well as for impact. |
| **Multiplier events** | Contribution to the costs linked to national and transnational conferences, seminars, events sharing and disseminating the intellectual outputs realised by the project (excluding costs for travel and subsistence of representatives of participating organisations involved in the project). | Contribution to unit costs | **100 EUR** per local participant (i.e. participants from the country where the event is taking place)<br>**200 EUR** per international participant (i.e. participants from other countries) | Maximum **30 000 EUR** per project | Conditional: support for multiplier events is provided only if in direct relation to the intellectual outputs of the project. A project without grant support for intellectual outputs cannot receive support for organising multiplier events. |

**FUNDING RULES FOR TRANSNATIONAL LEARNING, TEACHING AND TRAINING ACTIVITIES CARRIED OUT WITHIN THE STRATEGIC PARTNERSHIP (OPTIONAL FUNDING)**

<table>
<tr><th colspan="2">Eligible costs</th><th>Financing mechanism</th><th colspan="2">Amount</th><th>Rule of allocation</th></tr>
<tr><td rowspan="7">Travel</td><td rowspan="7">Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return</td><td rowspan="7">Contribution to unit costs</td><td colspan="2">For travel distances between 10 and 99KM:<br>20 EUR per participant</td><td rowspan="8">Conditional: applicants will have to justify that mobility activities are necessary to achieve the objectives and results of the project.<br>Travel distances must be calculated using the distance calculator supported by the European Commission[92]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[93]<br>The applicant must justify in the application form the request of funding covering Expensive domestic travel costs over 225 EUR (per return trip) .</td></tr>
<tr><td colspan="2">For travel distances between 100 and 499 KM:<br>180 EUR per participant</td></tr>
<tr><td colspan="2">For travel distances between 500 and 1999 KM:<br>275 EUR per participant</td></tr>
<tr><td colspan="2">For travel distances between 2000 and 2999 KM:<br>360 EUR per participant</td></tr>
<tr><td colspan="2">For travel distances between 3000 and 3999 KM:<br>530 EUR per participant</td></tr>
<tr><td colspan="2">For travel distances between 4000 and 7999 KM:<br>820 EUR per participant</td></tr>
<tr><td colspan="2">For travel distances of 8000 KM or more:<br>1500 EUR per participant</td></tr>
<tr><td>Individual support</td><td>Unit cost per day covering the subsistence of participants, including accompanying persons, during the activity</td><td>Contribution to unit costs</td><td>Long term teaching or training assignments<br><br>Long term mobility of youth workers</td><td>up to the 14th day of activity: B1.5 per day per participant<br>+<br>between the 15 th and 60 th day of activity: B1.6 per day per participant<br>+<br>between the 61th day of activity and up to 12 months: B1.7 per day per participant</td></tr>
</table>

92 http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

93 For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

| | | | | | |
|---|---|---|---|---|---|
| | | | Short term joint staff training events,<br><br>Teaching or providing expertise in Intensive Study Programmes<br><br>accompanying persons in all activities[94] | up to the 14th day of activity: **106 EUR** per day per participant<br>+<br>between the 15 th and 60 th day of activity: **74 EUR** per day per participant | |
| | | | Long term mobility of pupils | **B1.8** per month per participant | |
| | | | Short term activities for learners<br>(blended mobility, short term pupils' mobility, intensive study programmes): | up to the 14th day of activity: **58 EUR** per day per participant<br>+<br>between the 15 th and 60 th day of activity: **42 EUR** per day per participant | |
| **Linguistic support** | Costs linked to the support offered to participants in order to improve the knowledge of the language of instruction or work | Contribution to unit costs | Only for activities lasting between 2 and 12 months:<br>150 EUR per participant needing linguistic support | | Conditional: the request for financial support must be motivated in the application form. |
| **Exceptional Costs** | Expensive travel costs of participants, (for details, see section "what else you should know about this action"). | Real Costs | Expensive travel costs: maximum up to 80% of eligible costs | | Conditional: the request for financial support to cover exceptional costs must be motivated in the application form |

[94] Accompanying persons are entitled to receive the same rate, independently from the short or long term activities they take part in. In exceptional cases, where the accompanying person needs to stay abroad for more than 60 days, extra subsistence costs beyond the 60th day will be supported under the budget heading "Special needs support".

**TABLE A – INTELLECTUAL OUTPUTS (AMOUNTS IN EURO PER DAY)**

This funding can only be used for staff costs of organisations participating in the project for the production of Intellectual outputs[95]. The amounts depend on: a) profile of staff involved in the project and b) the country of the participating organisation whose staff is involved.

| | Manager | Teacher/Trainer/Researcher/ Youth worker | Technician | Administrative staff |
|---|---|---|---|---|
| | B1.1 | B1.2 | B1.3 | B1.4 |
| **Denmark, Ireland, Luxembourg, Netherlands, Austria, Sweden, Liechtenstein, Norway** | 294 | 241 | 190 | 157 |
| **Belgium, Germany, France, Italy, Finland, United Kingdom, Iceland** | 280 | 214 | 162 | 131 |
| **Czech Republic, Greece, Spain, Cyprus, Malta, Portugal, Slovenia** | 164 | 137 | 102 | 78 |
| **Bulgaria, Estonia, Croatia, Latvia, Lithuania, Hungary, Poland, Romania, Slovakia, former Yugoslav Republic of Macedonia, Turkey** | 88 | 74 | 55 | 39 |

[95] In the case of HE, costs for staff employed by faculties of ECHE accredited beneficiary universities are eligible under the cost category 'intellectual outputs

**TABLE B – INTELLECTUAL OUTPUTS (AMOUNTS IN EURO PER DAY)**

This funding can only be used for staff costs of organisations participating in the project for the production of Intellectual outputs[96]. The amounts depend on: a) profile of staff involved in the project and b) the country of the participating organisation whose staff is involved.

| | Manager | Teacher/Trainer/ Researcher/ Youth worker | Technician | Administrative staff |
|---|---|---|---|---|
| | B1.1 | B1.2 | B1.3 | B1.4 |
| **Australia, Canada, Kuwait, Macao, Monaco, Qatar, San Marino, Switzerland, United States of America** | 294 | 241 | 190 | 157 |
| **Andorra, Brunei, Japan, New Zealand, Singapore, United Arab Emirates, Vatican City State** | 280 | 214 | 162 | 131 |
| **Bahamas, Bahrain, Hong Kong, Israel, Korea (Republic of), Oman, Saudi Arabia, Taiwan** | 164 | 137 | 102 | 78 |
| **Afghanistan, Albania, Algeria, Angola, Antigua and Barbuda, Argentina, Armenia, Azerbaijan, Bangladesh, Barbados, Belarus, Belize, Benin, Bhutan, Bolivia, Bosnia and Herzegovina, Botswana, Brazil, Burkina Faso, Burundi, Cambodia, Cameroon, Cape Verde, Central African Republic, Chad, Chile, China, Colombia, Comoros, Congo, Congo – Democratic Republic of the, Cook Islands, Costa Rica, Cuba, Djibouti, Dominica, Dominican Republic, Ecuador, Egypt, El Salvador, Equatorial Guinea, Eritrea, Ethiopia, Fiji, Gabon, Gambia, Georgia, Ghana, Grenada, Guatemala, Guinea, Guinea-Bissau, Guyana, Haiti, Honduras, India, Indonesia, Iran, Iraq, Republic of Côte d'Ivoire, Jamaica, Jordan, Kazakhstan, Kenya, Kiribati, Korea (DPR), Kosovo, Kyrgyzstan, Laos, Lebanon, Lesotho, Liberia, Libya, Madagascar, Malawi, Malaysia, Maldives, Mali, Marshall Islands, Mauritania, Mauritius, Mexico, Micronesia – Federated States of, Moldova, Mongolia, Montenegro, Morocco, Mozambique, Myanmar, Namibia, Nauru, Nepal, Nicaragua, Niger, Nigeria, Niue, Pakistan, Palau, Palestine, Panama, Papua New Guinea, Paraguay, Peru, Philippines, Rwanda, Saint Kitts And Nevis, Saint Lucia, Saint Vincent And The Grenadines, Samoa, Sao Tome and Principe, Senegal, Serbia, Seychelles, Sierra Leone, Solomon Islands, Somalia, South Africa, South Sudan, Sri Lanka, Sudan, Suriname, Swaziland, Syria, Tajikistan, Tanzania, Territory of Russia as recognised by international law, Territory of Ukraine as recognised by international law, Thailand, Timor Lest – Democratic Republic of Togo, Tonga, Trinidad and Tobago, Tunisia, Turkmenistan, Tuvalu, Uganda, Uruguay, Uzbekistan, Vanuatu, Venezuela, Vietnam, Yemen, Zambia, Zimbabwe** | 88 | 74 | 55 | 39 |

[96] In the case of HE, costs for staff employed by faculties of ECHE accredited beneficiary universities are eligible under the cost category 'intellectual outputs

**TABLE C - SUBSISTENCE OF PARTICIPANTS IN TRANSNATIONAL LEARNING, TEACHING AND TRAINING ACTIVITIES (IN EURO PER DAY/MONTH)**

Scales of contribution to unit costs change according to: a) type of mobility and b) the country where the activity takes place:

| | Long-term teaching or training assignments - mobility of youth workers (in euro per day) | | | Long-term activities of pupils (in euro per month) |
|---|---|---|---|---|
| | B1.5 | B1.6 | B1.7 | B1.8 |
| **Norway, Denmark, Luxembourg, United Kingdom, Iceland, Sweden, Ireland, Finland, Liechtenstein** | 125 | 88 | 63 | 168 |
| **Netherlands, Austria, Belgium, France, Germany, Italy, Spain, Cyprus, Greece, Malta, Portugal** | 110 | 77 | 55 | 147 |
| **Slovenia, Estonia, Latvia, Croatia, Slovakia, Czech Republic, Lithuania, Turkey, Hungary, Poland, Romania, Bulgaria, the Former Yugoslav Republic of Macedonia** | 90 | 63 | 45 | 105 |

# KNOWLEDGE ALLIANCES

## WHAT ARE THE AIMS AND PRIORITIES OF A KNOWLEDGE ALLIANCE?

Knowledge Alliances aim at strengthening Europe's innovation capacity and at fostering innovation in higher education, business and the broader socio-economic environment. They intend to achieve one or more of the following aims:

- develop new, innovative and multidisciplinary approaches to teaching and learning;
- stimulate entrepreneurship and entrepreneurial skills of higher education teaching staff and company staff;
- facilitate the exchange, flow and co-creation of knowledge.

The main attention is turned to projects that contribute to the modernisation of Europe's higher education systems as outlined in the 2011 EU Communication on the Modernisation Agenda for Higher Education[97], namely increase attainment levels; improve the quality and relevance of higher education; strengthen quality through mobility and cross-border cooperation; make the knowledge triangle work; improve governance and funding

Additional emphasis is placed on making use of existing initiatives, and on the intelligent use of digital tools as recommended in the 2013 EU Communication on Opening Up Education[98].

## WHAT IS A KNOWLEDGE ALLIANCE?

Knowledge Alliances are transnational, structured and result-driven projects, notably between higher education and business. Knowledge Alliances are open to any discipline, sector and to cross-sectoral cooperation. The partners share common goals and work together towards mutually beneficial results and outcomes. The results and expected outcomes are clearly defined, realistic and address the issues identified in the needs analysis.
Knowledge Alliances are meant to have a short and long-term impact on the wide range of stakeholders involved, at individual, organisational and systemic level.

As a general rule, Knowledge Alliances target the cooperation between organisations established in Programme Countries. However, organisations from Partner Countries can be involved in a Knowledge Alliance, as partners (not as applicants), if their participation brings an essential added value to the project.

## WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Knowledge Alliances implement a coherent and comprehensive set of interconnected activities which are flexible and adaptable to different current and future contexts and developments across Europe. The following list provides examples of activities:

- **Boosting innovation in higher education, business and in the broader socio-economic environment:**
  - jointly developing and implementing new learning and teaching methods (like new multidisciplinary curricula, learner-centred and real problem-based teaching and learning);
  - organising continuing educational programmes and activities with and within companies;
  - jointly developing solutions for challenging issues, product and process innovation (students, professors and practitioners together).

- **Developing entrepreneurial mind-set and skills:**
  - creating schemes of transversal skills learning and application throughout higher education programmes developed in cooperation with enterprises aiming at strengthening employability, creativity and new professional paths;
  - introducing entrepreneurship education in any discipline to provide students, researchers, staff and educators with the knowledge, skills and motivation to engage in entrepreneurial activities in a variety of settings;
  - opening up new learning opportunities through the practical application of entrepreneurial skills, which can involve and/or lead to the commercialisation of new services, products and prototypes, to the creation of

[98] 2013 EU Communication on Opening Up Education: http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52013DC0654&from=EN

start-ups and spin-offs.

- **Stimulating the flow and exchange of knowledge between higher education and enterprises**:
  - study field related activities in enterprises which are fully embedded in the curriculum, recognised and credited;
  - set-ups to trial and test innovative measures;
  - exchanges of students, researchers, teaching staff and company staff for a limited period;
  - involvement of company staff into teaching and research.

Knowledge Alliances may organise learning mobility activities of students, researchers and staff in so far as they support/complement the other activities of the Alliance and bring added value in the realisation of the project's objectives. Mobility activities do not constitute the main activities of a Knowledge Alliance; extending and scaling-up these activities would need to be supported via the Key Action 1 of this Programme or other funding instruments.

### WHAT ARE THE ESSENTIAL FEATURES OF A KNOWLEDGE ALLIANCE?

The key features of Knowledge Alliances are:

- Innovation in higher education and innovation through higher education in enterprises and their socio-economic environment: innovation is considered as state-of-the-art project-specific and related to the partnerships context and analysed needs.
- Sustainability of university-business cooperation. A strong and committed partnership with a balanced participation from enterprises and higher education institutions are pivotal for the success of Knowledge Alliances. The role and contribution of each participating organisation and associate partner have to be specific and complementary.
- Impact going beyond the project's lifetime and beyond the organisations involved in the Alliance. It is expected that partnership and activities persist. For that, results/deliverables might not be stand-alone but be linked to/integrated into existing undertakings, schemes, projects, platforms, ventures etc. Changes in higher education institutions and enterprises have to be measurable. Results and solutions have to be transferable and accessible to a broader audience.

Knowledge Alliances are a highly competitive part of Erasmus+. Common attributes of successful proposals are:

- reliable relations between higher education institutions and enterprises: Knowledge Alliances have to demonstrate the commitment and added value of all partners, whereby strong and balanced involvement from both the business and higher education sectors is essential. A well designed proposal is the result of close cooperation between the prospective partners and based on a solid needs analysis;
- their innovative and transnational character, visible across all criteria.

A proper needs-analysis clarifies the rationale, influences the selection of partners, makes the proposal specific, helps to raise the potential for impact and ensures that end-user and target groups are well involved in the project activities.

### WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN A KNOWLEDGE ALLIANCE?

**Applicant/coordinator:** a participating organisation that submits the project proposal on behalf of all the partners. The coordinator has the full responsibility to ensure that the project is implemented in accordance with the agreement. Its coordinating covers the following duties:

- represents and acts on behalf of the Alliance towards the European Commission;
- bears the financial and legal responsibility for the proper operational, administrative and financial implementation of the entire project;
- coordinates the Alliance in cooperation with project partners.

**Full partners** are those participating organisations which contribute actively to the achievement of the Knowledge Alliance's objectives. Each full partner must sign a mandate to confer to the coordinating organisation the responsibility of acting as main beneficiary and act in his name during the implementation of the project. If relevant, the same applies for partners from Partner Countries.

**Associated partners** (optional): Knowledge Alliances can involve associated partners who contribute to the implementation of specific project tasks/activities or support the dissemination and sustainability of the Alliance. For contractual

management issues, "associated partners" are not considered as part of the project partners, and they do not receive funding. However their involvement and role in the project and different activities have to be clearly described.

**Affiliated entities** (optional): Organisations which contribute to the achievement of project objectives and activities. Affiliated entities must be identified in the grant application and satisfy the requirements as described in Annex III (Glossary of terms) of this Programme Guide.

## WHAT ARE THE CRITERIA USED TO ASSESS A KNOWLEDGE ALLIANCE PROPOSAL?

Here below are listed the formal criteria that a Knowledge Alliance proposal must respect in order to be eligible for an Erasmus+ grant:

### ELIGIBILITY CRITERIA

| | |
|---|---|
| **Eligible participating organisations** | A participating organisation can be any public or private organisation, with its affiliated entities (if any), established in a Programme Country or in any Partner Country of the world (see section "Eligible Countries" in Part A of this Guide).<br>For example, such an organisation can be:<br>▪ a higher education institution;<br>▪ a public or private, small, medium or large enterprise (including social enterprises);<br>▪ a research institute;<br>▪ a public body at local, regional or national level;<br>▪ an organisation active in the field of education, training and youth;<br>▪ an intermediary or association which represents education, training or youth organisations;<br>▪ an intermediary or association which represents enterprises;<br>▪ an accreditation, certification or qualification body.<br>Higher education institutions established in a Programme Country must hold a valid Erasmus Charter for Higher Education (ECHE). An ECHE is not required for participating HEIs in Partner Countries. |
| **Who can apply?** | Any participating organisation established in a Programme Country can be the applicant. This organisation applies on behalf of all participating organisations involved in the project. |
| **Number of participating organisations** | Knowledge Alliances are transnational and involve at minimum six independent organisations from at least three Programme Countries, out of which at least two higher education institutions and at least two enterprises. |
| **Duration of project** | 2 or 3 years. The duration has to be chosen at application stage, based on the objective of the project and on the type of activities planned over time.<br>In exceptional cases, the duration of a Knowledge Alliance may be extended, upon request by the beneficiary and with the agreement of the Executive Agency, of up to 6 months. In such a case, the total grant will not change. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application at the latest by **28 February at 12:00 (midday Brussels time)** for projects starting on 1 November of the same year or 1 January of the following year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

**AWARD CRITERIA**

The project will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the proposal**<br>**(maximum 25 points)** | ▪ Purpose: the proposal is relevant to the objectives of the Action (see section "What are the aims and priorities of a Knowledge Alliance");<br>▪ Consistency: the proposal is based on a sound and solid needs analysis; the objectives and outputs are clearly defined, realistic and address issues relevant to the participating organisations and to the Action;<br>▪ Innovation: the proposal considers state-of-the-art methods and techniques, and leads to project-specific innovative results and solutions;<br>▪ European added value: the proposal demonstrates clearly the added value generated through its transnationality and potential transferability; |
| **Quality of the project design and implementation**<br>**(maximum 25 points)** | ▪ Coherence: the proposal presents a coherent and comprehensive set of appropriate activities to meet the identified needs and lead to the expected results;<br>▪ Structure: the work programme is clear and intelligible, and covers all phases;<br>▪ Management: timelines, organisation, tasks and responsibilities are well defined and realistic. The proposal allocates appropriate resources to each activity;<br>▪ Quality and financial control: specific measures for evaluation of processes and deliverables ensure that the project implementation is of high quality and cost-efficient. |
| **Quality of the project team and the cooperation arrangements**<br>**(maximum 30 points)** | ▪ Configuration: the proposed Knowledge Alliance involves an appropriate mix of higher education and business partners with the necessary profiles, skills, experience, expertise and management support required for its successful realisation;<br>▪ Commitment: each participating organisation demonstrates full involvement corresponding to its capacities and specific area of expertise;<br>▪ Partnership: contributions of higher education and business partners are significant, pertinent and complementary;<br>▪ Collaboration/Team spirit: the proposal includes clear arrangements and responsibilities for transparent and efficient decision-making, conflict resolution, reporting and communication between the participating organisations;<br>▪ Reward: Project provides clear added value and benefits to each partner organisation<br>▪ Involvement of Partner Countries: if applicable, the involvement of a participating organisation from a Partner Country brings an essential added value to the project (if this condition is not fulfilled, the project will not be considered for selection). |
| **Impact and dissemination**<br>**(maximum 20 points)** | ▪ Exploitation: the proposal demonstrates how the outputs will be used by the partners and other stakeholders and will lead to the expected outcomes. Appropriate measures are in place for evaluating the outcomes of the project. The proposal provides means to measure exploitation within the project lifetime and after.<br>▪ Dissemination: the proposal provides a clear plan for the dissemination of results, and includes appropriate activities, tools and channels to ensure that the results and benefits will be spread effectively to the stakeholders and non-participating audience within and after the project's lifetime; |

| | |
|---|---|
| | ▪ Impact: the proposal shows societal and economic relevance and outreach. It provides pertinent measures to monitor progress and assess the expected impact (short and long-term);<br>▪ Open access: If relevant, the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limitations;<br>▪ Sustainability: the proposal includes appropriate measures and resources to ensure that the partnership, project results and benefits will be sustained beyond the project lifetime. |

To be considered for funding, proposals must score at least 70 points. Furthermore, they must score minimum 13 points for the categories "relevance of the project" and "quality of the project design and implementation"; 16 points for the category "quality of the project team and cooperation arrangements", and 11 points for the category "impact and dissemination".

### WHAT ELSE SHOULD YOU KNOW ABOUT THIS ACTION?

Quality assurance must be an embedded project component to ensure that Knowledge Alliances successfully deliver the expected results and achieve an impact going far beyond the partner organisations themselves. Knowledge Alliances are required to accomplish targeted dissemination activities which reach out to stakeholders, policy makers, professionals and enterprises. Along the way Knowledge Alliances should deliver publications such as reports, handbooks, guidelines, etc. As a general rule, results should be made available as open educational resources (OER) as well as on relevant professional, sectorial or competent authorities' platforms. Knowledge Alliances should generate new ways and instruments to facilitate their collaboration and to ensure that the partnership between higher education and business persists.

Knowledge Alliances are a recent and ambitious Action; they are subject to a particular monitoring which requires active participation from all participants and stakeholders. Knowledge Alliances should foresee their participation in thematic clusters to support cross-fertilisation, exchange of good practices and mutual learning. Additionally, Knowledge Alliances should budget for the presentation of their project and the results at the University-Business Forum and/or other relevant events (up to five during the project duration).

### WHAT ARE THE FUNDING RULES?

The budget of the project must be drafted on the basis of the unit cost system. The "unit costs" system is a simplified form of determining the amount of the grant. By its nature, such simplified forms of grants are contributions to the main costs of a project which are not a reimbursement of the real expenditures linked to specific activities in the project. In the case of the Alliances projects, the unit costs established are applied to the staff component of a project. They are predefined contributions established per working day per category of worker.

The budget of the project must be drafted according to the following funding rules (in euro):

**Maximum EU contribution awarded for a 2-year Knowledge Alliance: 700 000 EUR**
**Maximum EU contribution awarded for a 3-year Knowledge Alliance: 1 000 000 EUR**

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Implementation support** | Contribution to any activity directly linked to the implementation of the project (except for possible embedded mobility) including: project management, project meetings, intellectual outputs (such as curricula, pedagogical materials, open educational resources (OER), IT tools, analyses, studies, etc.), dissemination, participation in events, conferences, travel, etc.<br>The number of days and the profile of staff involved by country is the basis for the calculation of the EU contribution. | Contribution to unit costs | B2.1 per manager involved per day of work on the project | Conditional: applicants will have to justify the type and volume of resources needed in relation to the implementation of the proposed activities and outputs.<br>The outputs should be substantial in quality and quantity to qualify for this type of grant support. |
| | | | B2.2 per researcher/ teacher/trainer involved per day of work on the project | |
| | | | B2.3 per technician involved per day of work on the project | |
| | | | B2.4 per administrative staff involved per day of work on the project | |

* Please refer to the International Standard Classification of Occupations – ISCO (http://www.ilo.org/public/english/bureau/stat/isco/isco08/index.htm)

### ADDITIONAL FUNDING RULES FOR MOBILITY ACTIVITIES REALISED WITHIN A KNOWLEDGE ALLIANCE (OPTIONAL FUNDING)

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, from their place of origin to the venue of the activity and return | Contribution to unit costs | For travel distances between 100 and 1999 KM:<br>275 EUR per participant | Conditional: applicants will have to justify that mobility activities are necessary to achieve the objectives and |
| | | | For travel distances of 2000 KM or more:<br>360 EUR per participant | |

| | | | | |
|---|---|---|---|---|
| **Subsistence costs** | Contribution to subsistence costs of participants during the activity | Contribution to unit costs | **Activities targeting staff**<br>up to the 14th day of activity: 100 EUR per day per participant<br>+<br>between the 15 th and 60 th day of activity: 70 EUR per day per participant | results of the project. Travel distances must be calculated using the distance calculator supported by the European Commission[99]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[100] |
| | | | **Activities targeting learners:**<br>up to the 14th day of activity: 55 EUR per day per participant<br>+<br>between the 15 th and 60 th day of activity: 40 EUR per day per participant | |

[99] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[100] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return.

**TABLE A - PROJECT IMPLEMENTATION (AMOUNTS IN EURO PER DAY) PROGRAMME COUNTRIES**

The amounts depend on: a) profile of staff engaged in the project and b) the country of the participating organisation whose staff is engaged.

| | Manager | Teacher/Trainer/Researcher/ Youth worker | Technician | Administrative staff |
|---|---|---|---|---|
| | B2.1 | B2.2 | B2.3 | B2.4 |
| **Denmark, Ireland, Luxembourg, Netherlands, Austria, Sweden, Liechtenstein, Norway** | 353 | 289 | 228 | 189 |
| **Belgium, Germany, France, Italy, Finland, United Kingdom, Iceland** | 336 | 257 | 194 | 157 |
| **Czech Republic, Greece, Spain, Cyprus, Malta, Portugal, Slovenia** | 197 | 164 | 122 | 93 |
| **Bulgaria, Estonia, Croatia, Latvia, Lithuania, Hungary, Poland, Romania, Slovakia, former Yugoslav Republic of Macedonia, Turkey** | 106 | 88 | 66 | 47 |

**TABLE B - PROJECT IMPLEMENTATION (AMOUNTS IN EURO PER DAY) PARTNER COUNTRIES**

The amounts depend on: a) profile of staff engaged in the project and b) the country of the participating organisation whose staff is engaged.

| | Manager | Teacher/Trainer/Researcher | Technician | Administrative staff |
|---|---|---|---|---|
| | B2.1 | B2.2 | B2.3 | B2.4 |
| **Australia, Canada, Kuwait, Macao, Monaco, Qatar, San Marino, Switzerland, United States of America** | 353 | 289 | 228 | 189 |
| **Andorra, Brunei, Japan, New Zealand, Singapore, United Arab Emirates, Vatican City State** | 336 | 257 | 194 | 157 |
| **Bahamas, Bahrain, Hong Kong, Israel, Korea (Republic of), Oman, Saudi Arabia, Taiwan** | 197 | 164 | 122 | 93 |
| **Afghanistan, Albania, Algeria, Angola, Antigua and Barbuda, Argentina, Armenia, Azerbaijan, Bangladesh, Barbados, Belarus, Belize, Benin, Bhutan, Bolivia, Bosnia and Herzegovina, Botswana, Brazil, Burkina Faso, Burundi, Cambodia, Cameroon, Cape Verde, Central African Republic, Chad, Chile, China, Colombia, Comoros, Congo, Congo – Democratic Republic of the, Cook Islands, Costa Rica, Cuba, Djibouti, Dominica, Dominican Republic, Ecuador, Egypt, El Salvador, Equatorial Guinea, Eritrea, Ethiopia, Fiji, Gabon, Gambia, Georgia, Ghana, Grenada, Guatemala, Guinea, Guinea-Bissau, Guyana, Haiti, Honduras, India, Indonesia, Iran, Iraq, Republic of Côte d'Ivoire, Jamaica, Jordan, Kazakhstan, Kenya, Kiribati, Korea (DPR), Kosovo, Kyrgyzstan, Laos, Lebanon, Lesotho, Liberia, Libya, Madagascar, Malawi, Malaysia, Maldives, Mali, Marshall Islands, Mauritania, Mauritius, Mexico, Micronesia – Federated States of, Moldova, Mongolia, Montenegro, Morocco, Mozambique, Myanmar, Namibia, Nauru, Nepal, Nicaragua, Niger, Nigeria, Niue, Pakistan, Palau, Palestine, Panama, Papua New Guinea, Paraguay, Peru, Philippines, Rwanda, Saint Kitts And Nevis, Saint Lucia, Saint Vincent And The Grenadines, Samoa, Sao Tome and Principe, Senegal, Serbia, Seychelles, Sierra Leone, Solomon Islands, Somalia, South Africa, South Sudan, Sri Lanka, Sudan, Suriname, Swaziland, Syria, Tajikistan, Tanzania, Territory of Russia as recognised by international law, Territory of Ukraine as recognised by international law, Thailand, Timor Lest – Democratic Republic of Togo, Tonga, Trinidad and Tobago, Tunisia, Turkmenistan, Tuvalu, Uganda, Uruguay, Uzbekistan, Vanuatu, Venezuela, Vietnam, Yemen, Zambia, Zimbabwe** | 106 | 88 | 66 | 47 |

# SECTOR SKILLS ALLIANCES

## WHAT ARE THE AIMS AND PRIORITIES OF A SECTOR SKILLS ALLIANCE?

Sector Skills Alliances aim at tackling skills gaps with regard to one or more occupational profiles in a specific sector. They do so by identifying existing or emerging sector-specific labour market needs (demand side), and by enhancing the responsiveness of initial and continuing vocational education and training (VET) systems, at all levels, to the labour market needs (supply side). Drawing on evidence regarding skills needs, Sector Skills Alliances support the design and delivery of transnational vocational training content, as well as teaching and training methodologies for European professional core profiles.

Sector Skills Alliances for strategic sectoral cooperation on skills identify and develop concrete actions to match demand and supply of skills to support the overall sector-specific growth strategy.

This should be achieved through actions aimed at the following objectives:

- identification of existing and emerging skills needs for professions in specific sectors;
- strengthening the exchange of knowledge and practice between education and training institutions and the labour market;
- modernising VET by adapting provision to skills needs;
- integrating work-based learning in VET provision, and exploiting its potential to drive economic development and innovation, increasing the competitiveness of the sectors concerned;
- building mutual trust, facilitating cross-border certification and therefore easing professional mobility in a sector, and increasing recognition of qualifications at European level within a sector;
- improving skills intelligence and providing a clear strategy and instruments to address skills shortages in specific economic sectors.

## WHAT IS A SECTOR SKILLS ALLIANCE?

Sector Skills Alliances are transnational projects identifying or drawing on existing and emerging skills needs in a specific economic sector and/or translating these needs into vocational curricula to respond to those needs.

A particular focus will be on **digital skills** as they are increasingly important on all job profiles across the entire labour market.

Also, the transition to a circular and greener economy needs to be underpinned by changes to qualifications and national education and training curricula to meet emerging professional needs for **green skills**.

Projects can achieve these aims by applying to one or several of the following Lots (an organisation can be involved as applicant in several proposals and Lots as long as the proposals address different sectors):

**Lot 1: Sector Skills Alliances for skills needs identification** will work at sectoral level in order to provide clear and detailed evidence of what the needs and gaps are. This would make it possible to address such gaps through training provision, whether it is VET-based (Lot 2) or other education and training.

**Lot 2: Sector Skills Alliances for design and delivery of VET** will work to **design and deliver common training content** for vocational programmes for one or several related profession/s in a sector, as well as teaching and training methodologies. A particular focus is to be put on **work-based learning**, providing learners with the skills required by the labour market. Lot 2 - Sector Skills Alliances are required to apply EU wide instruments and tools such as the EQF, ECVET, EQAVET.

**Lot 3: Sector Skills Alliances for implementing a new strategic approach (Blueprint) to sectoral cooperation on skills:** The Blueprint for Sectoral Cooperation on Skills[101] is one of the ten actions in the New Skills Agenda for Europe (see description on Europa webpage[102]). In the current call, the Blueprint will be implemented in six sectors that are experiencing severe skills shortages (see eligibility criteria). Alliances under Lot 3 will support the implementation of the Blueprint by developing a *sectoral skills strategy*. This strategy has to lead to systemic and structural impact on reducing skills shortages, gaps and mismatches, as well as ensuring appropriate quality and levels of skills to support growth, innovation and competitiveness in the sector. The sectoral skills strategy must include a clear set of activities, milestones and well-defined outputs with the goal to match demand and supply of skills to support the overall sector specific growth strategy. The objectives of Lot 1 (forecasting skills demand) and Lot 2 (responding to identified skills needs through design and delivery of VET) have to be

[101] http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item_id=8848

included in the sectoral skills strategy.

In case two or more proposals receive the same score and the available budget is not sufficient to finance all of them, proposals from members of European Sector Skills Councils will be given priority.

## WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Each Sector Skills Alliance shall implement a coherent, comprehensive and variable set of interconnected activities which are flexible and adaptable to different current and future labour markets' needs, such as:

### LOT 1: SECTOR SKILLS ALLIANCE FOR SKILLS NEEDS IDENTIFICATION

***Defining skills and training provision needs in a given specific economic sector:***

- gathering and interpreting evidence of skills needs on the labour market in a given economic sector, including by drawing on the Skills Panorama (e.g. Cedefop skills forecasts, various survey data, analytical highlights) and, where relevant, on the work of European Sector Skills Councils or previous Sector Skills Alliances;
- analysing the trends and challenges that shape the sector and its labour market with focus on drivers of change that may influence skills demand and supply in the sector (e.g. automation, demography);
- based on the above activities, providing a detailed assessment of the current and anticipated skills shortages, gaps and mismatches in the sector (both job specific and soft skills), as well as the need for the review of occupational profiles, indicating the priority in which they should be addressed, on the basis inter alia of their impact on growth and competiveness potential in the sector and on employment (e.g. likely job loss, hard-to-fill vacancies);
- analysing the potential impact of such skills needs on growth and employment in the sector;
- analysing major trends affecting closely interrelated sectors, to capture potential spill-over effects;
- identifying needs in terms of training provision, drawing on, where available, the occupational profiles of the classification of ESCO;
- delivering all relevant EU and/or country level qualitative evidence and quantitative data on skills, employment and economic performance of the sector in an electronic form, in linked open data format, so that it can feed into the Skills Panorama[103].

### LOT 2: SECTOR SKILLS ALLIANCE FOR DESIGN AND DELIVERY OF VET

***Designing trans-national sector-wide vocational curricula:***

- on the basis of identified skills needs for specific occupation profiles in a given economic sector, identify and design VET curricula or qualification standards (in line with EQF and informed by ESCO), to respond to those needs;
- translating skill needs into innovative, learning outcome-oriented modular VET programmes and/or qualifications (applying ECVET for designing qualifications composed of units of learning outcomes), to allow for transparency and comparability, taking also into account needs of validation of prior learning (e.g. non-formal or informal);
- applying quality management to the new training content either by applying the quality assurance principles of EQAVET or by using already existing quality assurance systems which, however, should be in line with EQAVET;
- integrating periods of work-based learning into the new training content, including opportunities to apply knowledge in practical "real life" workplace situations, and embedding trans-national learning experience whenever possible;
- designing VET provision focusing both on job specific skills as well as on key competences[104], soft skills, and STEM disciplines (science, technology, engineering and mathematics), while providing effective opportunities to acquire or develop those competences, particularly in work-related training contexts;
- promoting relevant VET sectoral qualifications (including trans-national joint programmes awarded by more than

[102] HTTP://WWW.EC.EUROPA.EU/SOCIAL/MAIN.JSP?CATID=1223

[103] This should be done using Cedefop's 'Practical framework for including sectoral skills evidence in the Skills Panorama': http://skillspanorama.cedefop.europa.eu/en

[104] http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32006H0962&from=EN

one VET provider), and support agreement for their recognition by implementing ECVET principles, and referencing qualifications to NQFs and the EQF as well as other relevant European tools and instruments in the sector concerned;

- increasing recognition of qualifications at European and national level within a sector, by promoting and agreeing on sectoral qualifications, facilitating cross-border certification, and building mutual trust, contributing to increased learner and professional mobility in the sector;
- identifying, documenting and promoting successful skills or qualifications related projects and good practices, as well as those fostering multi-stakeholder partnerships, including from other sectors or from outside Europe and make detailed proposals to replicate or scale them up, where relevant;
- where relevant, ensure that results of the project are available in open data format so that they could feed into the Skills Panorama and ESCO.

***Delivering vocational curricula:***

- identifying the most appropriate delivery methodologies for the curricula, using innovative approaches to teaching and learning, as well as a strategic and integrated use of ICTs (e.g. blended learning, simulators, etc.), and open educational resources (e.g. MOOC´s[105]);
- identifying ways to implement innovative VET teaching and learning methods to respond to the needs of specific target groups of learners; and through the provision of work-based learning;
- developing actions to facilitate inter-generational transfer of knowledge within VET;
- describing the ways in which assessment methodologies and procedures can embed all forms of learning, including work-based learning, and facilitate the validation of skills and competences acquired prior to training;
- identifying adequate measures to track learners after completing their training in order to provide "feedback loops"[106]. These tracking and feedback systems can build on information from companies, learners/employees, as well as public information resources and labour market stakeholders;
- proposing the appropriate measures for the formal recognition of the new or adapted vocational curricula and qualifications in participating countries and in the sector(s) covered;
- planning the progressive roll-out of project deliverables leading to systemic impact.

### LOT 3: SECTOR SKILLS ALLIANCES FOR IMPLEMENTING A NEW STRATEGIC APPROACH (BLUEPRINT) TO SECTORAL COOPERATION ON SKILLS

Sector Skills Alliances under this Lot shall set up sustainable cooperation on skills development between key industry stakeholders in a given sector, education and training providers, and public authorities.

Alliances in this Lot cover the activities of Lot 1 (as appropriate for the sector) and Lot 2. Moreover, they have to cover the following activities:

- developing a *sectoral skills strategy* to support the objectives of the established growth strategy for the sector. This strategy should be the first key deliverable of the project, identifying concrete actions and indicating clear set of activities, milestones and well-defined outputs, to suggest how to match demand and supply of skills. The strategy should detail how major trends, such as global, societal, and technological developments in the sector, are likely to affect jobs and skills needs. It should describe the expected timeline and give particular attention to the impact of digital and key enabling technologies;
- to underpin and illustrate the strategy, identifying, documenting and promoting concrete examples of policies and initiatives at national and regional level aiming at addressing skills shortages and mismatches as well as fostering multi-stakeholder partnerships (e.g. between industry, social partners, education and training, public authorities). Such examples should be presented in the form of fiches, containing a clear description of the policy/project, role and responsibilities of the different stakeholders, duration, funding (where available), and results;
- developing a common methodology for assessing the current situation and anticipating future needs as well as monitoring (on a yearly basis) progress and the evolution of the demand and supply of skills based on credible foresight scenarios;

[105] A MOOC is a Massive Open Online Course aimed at unlimited participation and open access via the web. In addition to traditional course materials such as filmed lectures, readings, and problem sets, many MOOCs provide interactive user forums to support community interactions among students, professors, and teaching assistants.

[106] See Medium-term deliverable 2 (MTD2), in 2015 Riga Conclusions: http://ec.europa.eu/dgs/education_culture/repository/education/policy/vocational-policy/doc/2015-riga-conclusions_en.pdf

- identifying occupational profiles that need to be revised or created and their corresponding skill needs as well as the required proficiency level, drawing on, where available, the occupational profiles in ESCO and existing competence frameworks[107]; where relevant, the development of sectoral competence frameworks may be considered;
- identifying, describing and indicating priorities for the review or the establishment of new qualifications on the basis of the relevant occupational profiles;
- fostering the development of concrete solutions in VET provision (including higher VET) as well as business-education-research partnerships;
- developing concrete solutions to promote mobility of vocational students, jobseekers and trainees across Europe in the sector, capitalising on the use of existing EU tools (e.g. Erasmus+, EURES, Drop'Pin, European Alliance for Apprenticeships);
- developing actions to promote the attractiveness of the sector as a career choice, in particular among the young, while also aiming for a gender balance in the sector;
- designing long term *action plan* for the progressive roll-out of project deliverables after the project has finished. This plan shall be based on sustained partnerships between education and training providers and key industry stakeholders at the appropriate level. It should include the identification of appropriate governance structures, as well as plans for scalability and financial sustainability. It should also ensure the appropriate visibility and wide dissemination of the work of the Alliance, including at EU and national political level and include details on how the roll-out will be implemented at national and/or regional levels with relevant governmental and sectoral authorities;

  The *action plan* shall also indicate how EU funding opportunities (e.g. European Structural Funds, European Fund for Strategic Investment, Erasmus+, COSME, sectoral programmes), as well as national and regional funding can support skills strategies. This should take into account national and regional smart specialisation strategies;
- delivering all relevant EU and/or country level qualitative evidence and quantitative data according to linked open data format[108].

### WHAT ARE THE ESSENTIAL FEATURES OF A SECTOR SKILLS ALLIANCE?

The key features of Sector Skills Alliances are:

- Innovation in **vocational education and training** for specific professions in economic sectors (where available ESCO[109]:) and;
- Impact going beyond the project's lifetime and beyond the organisations involved in the Alliance. It is expected that partnership and activities persist. Changes in VET provision for professional profiles have to be measurable. Results and solutions have to be transferable and accessible to a broader audience. The results of Sector Skills Alliances should become available for use and publication in the EU Skills Panorama.

Sector Skills Alliances have to demonstrate the commitment and added value of all partners. The partners should combine systemic and sector-related information with a solid knowledge of skills needs and training practices in their economic sector. The distribution of tasks and deliveries should show a right match between the partners' expertise and the activities they are in charge of. The partners should be representative in the sector at least at national level, have a European outreach and expertise or competence in vocational skills anticipation or supply, training, or qualification design.

In **Lot 1- Sector Skills Alliances for skills needs identification** the identification and definition of future skills needs should be supported by research on labour market needs in the sector. Collaboration between public and private actors on the labour market (such as labour ministries, social partners, training and education providers, labour market intelligence entities, companies including SME's, chambers of commerce, public and private employment services and national statistics offices) should be encouraged to work together to identify and anticipate persistent skills shortages and mismatches at sectoral level and help fill the gap between labour supply and demand. It is important to maximise synergies with other sectoral initiatives.

In **Lot 2- Sector Skills Alliances for design and delivery of VET** partners will have to interpret existing research evidence on profession-specific skills needs when implementing vocational education and training or designing qualification standards based on a common European professional core profile, drawing, where available on ESCO. Where appropriate, they should base themselves on skills intelligence gathered by "European Sector Skills Councils" and already existing sector skills studies that have been commissioned by the European Commission. The EU Skills Panorama provides a wealth of skills intelligence,

[107] E.g. the Digital Competence Framework for Citizens, the Entrepreneurship Competence Framework and the European e-Competence Framework (e-CF).

[108] This should be done using Cedefop's 'Practical framework for including sectoral skills evidence in the Skills Panorama'. http://skillspanorama.cedefop.europa.eu/en

[109] HTTPS://EC.EUROPA.EU/ESCO/HOME

analyses and studies on professions (occupations) and sectors.

The Alliance should then translate these into innovative, learning outcome-oriented vocational curricula (applying ECVET) which include periods of work-based learning and which should be underpinned by quality assurance mechanisms (in line with EQAVET). The Alliance partners should demonstrate in the proposal what measures they will take in the countries and in the sector covered for the formal recognition (initial vocational education & training) or the certification (continuing vocational training) of the new or adapted vocational curriculum/a and how they will pursue the procedures after EU funding has ended. Career guidance services together with regional or local authorities should play a "facilitator" role in supporting the process of skills matching with the planning of vocational curricula in order to attract initial VET schools, young learners or their parents to specific professions with high labour market demand. Sector Skills Alliances are supposed to carry out the proposed activities in a way that maximises the impact on one, or several related, profession/s in a given sector.

In **Lot 3- Sector Skills Alliances for implementing a new strategic approach (Blueprint) to sectoral cooperation on skills** in addition to what is outlined for Lot 1 and Lot 2, partners will have to develop a comprehensive and strategic approach encompassing all activities. This strategic approach should be clearly linked to the overall growth strategy of the sector, with a view to support the sector in addressing its most pressing challenges and achieving its medium and long-term goals, including where relevant in terms of growth, innovation, competitiveness and employment. The Alliances will have to take into account and reflect in their work the main policy developments and publications at EU level pertaining to their sector.

### WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN A SECTOR SKILLS ALLIANCE?

**Applicant/coordinator:** a participating organisation that submits the project proposal on behalf of all the partners. The coordinator has the full responsibility to ensure that the project is implemented in accordance with the agreement. Its coordinating covers the following duties:

- represents and acts on behalf of the Alliance towards the European Commission;
- bears the financial and legal responsibility for the proper operational, administrative and financial implementation of the entire project;
- coordinates the Alliance in cooperation with project partners.

**Full partners:** participating organisations which contribute actively to the accomplishment of the Sector Skills Alliance. Each full partner must sign a mandate by which the signatory agrees that the coordinator takes over the above listed duties on behalf of the partnership during the implementation of the project. The same applies for partners from Partner Countries.

**Associated partners (optional)**: Sector Skills Alliances can involve associated partners who contribute to the activities of the Sector Skills Alliance. They are not subject to contractual requirements because they do not receive funding. However their involvement and role in the project and different work packages have to be clearly described.

**Affiliated entities (optional)**: Organisations which contribute to the achievement of project objectives and activities. Affiliated entities must be identified in the grant application and satisfy the requirements as described in Annex III (Glossary of terms) of this Programme Guide.

### WHAT ARE THE CRITERIA USED TO ASSESS A SECTOR SKILLS ALLIANCE?

Here below are listed the formal criteria that a Sector Skills Alliance proposal must respect in order to be eligible for an Erasmus+ grant:

## LOT 1: SECTOR SKILLS ALLIANCES FOR SKILLS NEEDS IDENTIFICATION

### ELIGIBILITY CRITERIA FOR LOT 1

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| **Eligible participating organisations** | The following organisations, with its affiliated entities (if any), are eligible to take part in a Lot 1 Alliance. They can be public or private organisation established in a Programme Country (see section "Eligible Countries" in Part A of this Guide).<br><br>• European and/or national social partners;<br>• labour ministries or associated bodies (agencies or councils);<br>• public or private employment services;<br>• labour market research institutes, national statistics offices;<br>• public or private, small, medium or large enterprises (including social enterprises);<br>• economic development agencies;<br>• chambers of commerce, of industry or of labour;<br>• sectoral or professional associations of employers or employees; chambers of skilled crafts;<br>• European or national sectoral umbrella organisations;<br>• training or education providers at local, regional or national level;<br>• sector-based research institutes;<br>• bodies providing career guidance, professional counselling and information services;<br>• public authorities responsible for education and training at regional or national level. |
| **Who can apply?** | Any participating organisation established in a Programme Country can be the applicant. This organisation applies on behalf of all participating organisations involved in the project. |
| **Number and profile of participating organisations** | The Sector Skills Alliance must cover **at least 12 Programme Countries** and include **at least 2 full partners, out of which at least 1 represents the industry and at least 1 represents education and training providers.**<br><br>The geographical coverage can be ensured by the participation of national organisations and/or by European-wide umbrella organisations[110] or European social partners. The capacity of covering more than one country of the Alliance by European wide organisations or social partners must be proven at the moment of application. |
| **Eligible sectors** | All sectors[111] except the six sectors that are eligible under Lot 3. |
| **Duration of project** | 2 or 3 years. The duration has to be chosen at application stage, based on the objective of the project and on the type of activities planned over time.<br><br>In exceptional cases, the duration of a Sector Skills Alliance may be extended, upon request by the beneficiary and with the agreement of the Executive Agency, of up to 6 months. In such a case, the total grant will not change. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **28 February at 12:00 (midday Brussels time)** for projects starting on 1 November or 1 December of the same year, or 1 January of the following year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

110 A European umbrella organisation is an association of (often related, sector-specific) several national member organisations that coordinates their activities, promotes a common purpose and works to protect their shared interests at European level.

111 As they are defined by the Eurostat NACE – Statistical classification of economic activities in the European Union.

**AWARD CRITERIA FOR LOT 1**

The project will be assessed against the following criteria:

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| **Relevance of the project (maximum 25 points)** | ▪ Link to policy: the proposal contributes to achieving the European objectives in the field of Skills identification and anticipation;<br>▪ Digital skills: extent to which the proposal foresees investigation into the needs of digital skills. Proposals including this aspect will be considered highly relevant;<br>▪ Green skills: extent to which the proposal foresees investigation into skills requirements linked to the transition to a circular and greener economy. Proposals including this aspect will be considered highly relevant;<br>▪ Purpose: the proposal is relevant to the objectives of the Action (see section "What are the aims of a Sector Skills Alliance");<br>▪ Consistency: the objectives are based on a sound needs analysis; they are clearly defined, realistic and address issues relevant to the participating organisations and to the Action;<br>• Innovation: the proposal considers state-of-the-art methods and techniques, and leads to innovative results and solutions;<br>• European added value: the proposal demonstrates clearly the added value generated through its transnationality. |
| **Quality of the project design and implementation (maximum 30 points)** | ▪ Coherence: the overall project design ensures consistency between project objectives, methodology, activities and budget proposed. The proposal presents a coherent and comprehensive set of appropriate activities to meet the identified needs and lead to the expected results;<br>▪ Structure: the work programme is clear and intelligible, and covers all phases (preparation, implementation, exploitation, monitoring, evaluation and dissemination);<br>▪ Management: solid management arrangements are foreseen. Timelines, organisation, tasks and responsibilities are well defined and realistic. The proposal allocates appropriate resources to each activity;<br>▪ Budget: the budget provides for appropriate resources necessary for success, it is neither overestimated nor underestimated;<br>▪ Financial and quality control: control measures (continuous quality evaluation, peer reviews, benchmarking activities, etc.) and quality indicators ensure that the project implementation is of high quality and cost-efficient. Challenges/risks of the project are clearly identified and mitigating actions properly addressed. Expert review processes are planned as an integral part of the project. The Alliance work programme includes an independent external quality assessment at mid-term and at the end of the project. |
| **Quality of the project team and the cooperation arrangements (maximum 25 points)** | ▪ Configuration: the composition of the partnership is in line with the project objectives, bringing together as relevant the expertise and competences required in skills identification and anticipation, skills supply, and skills policy issues more generally. The participation of European and/or national social partners with a clear attribution of a role to identify and anticipate skills needs in the given sector is highly relevant. The representativeness and expertise of the partners in the sector concerned and at European level is convincingly demonstrated. The spread and representativeness of relevant partners over the Programme Countries involved in the Alliance should be such that the Alliance has high potential for impact in several of the countries covered by the Alliance (e.g. through the participation of a European sector organisation or European social partners);<br>▪ Commitment: the distribution of responsibilities and tasks is clear, appropriate, and demonstrates the commitment and active contribution of all participating organisations in relation to their specific expertise and capacity;<br>▪ Tasks: the coordinator shows high quality management and coordination of transnational networks and leadership in complex environment. Individual tasks are allocated on the basis of the specific know-how of each partner;<br>▪ Collaboration/Team spirit: an effective mechanism is proposed to ensure a good coordination, decision-making and communication between the participating organisations, participants and any other relevant stakeholder. |

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| **Impact and dissemination (maximum 20 points)** | ▪ Exploitation: the proposal demonstrates how the outcomes of the Alliance will be used by the partners and other stakeholders. It provides means to measure exploitation within project lifetime and after;<br>▪ Dissemination: the proposal provides a clear plan for the dissemination of results, and includes appropriate activities, tools and channels to ensure that the results and benefits will be spread effectively to the stakeholders: policy makers, guidance professionals, enterprises and young learners in compulsory education concerning occupations with high labour market demand or new business creation potential; within and after the project's lifetime; the proposal indicates which partners will be responsible for dissemination and demonstrates the relevant experience that they have in dissemination activities;<br>▪ Impact: the proposal shows societal and economic relevance and outreach. It is likely to significantly increase partners' capacity to implement relevant training in the European context. It also provides pertinent measures to monitor progress and assess the expected impact (short- and long-term);<br>▪ Open access[112]: If relevant, the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences[113] and does not contain disproportionate limitations;<br>▪ Sustainability: the proposal includes appropriate measures and resources to ensure that the results and benefits achieved by the Alliance will be sustained beyond the project lifetime (i.e. how the information on future skills needs can be addressed in the sector through training provision and curriculum design). This could be VET-based (Lot 2) or other training. The proposal explains how and with which resources (other than EU funds) this will be done. |

To be considered for funding, proposals must score at least 70 points. Furthermore, they must score minimum 13 points for the categories "relevance of the project" and "quality of the project team and cooperation arrangements"; 16 points for the category "quality of the project design and implementation", and 11 points for the category "impact and dissemination".

### LOT 2: SECTOR SKILLS ALLIANCES FOR DESIGN AND DELIVERY OF VET

#### ELIGIBILITY CRITERIA FOR LOT 2

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| **Eligible participating organisations** | The following organisations, with its affiliated entities (if any), are eligible to take part in a Lot 2 Alliance. They can be public or private organisations established in a Programme Country (see section "Eligible Countries" in Part A of this Guide).<br>• public or private VET providers, including social enterprises, in particular those with an own training department, those providing apprenticeships, and those providing shared training (collaborative training);<br>• EU or national organisations representing industry, small and medium-sized enterprises, relevant sectoral organisations;<br>• networks of VET providers and European or national organisations representing them;<br>• Education and training authorities at regional or national level, and Ministries;<br>• organisations or networks – at EU or national level – representing social partners, industry, sectoral organisations, professions and education and training stakeholders, including youth organisations;<br>• chambers of commerce, of industry, of skilled crafts or of labour, and other intermediary bodies;<br>• sector skills councils;<br>• economic development agencies, statistical bodies and research institutes;<br>• cultural and/or creative bodies;<br>• bodies providing career guidance, professional counselling, information services and employment services;<br>• accreditation, certification, recognition or qualification bodies (bodies with "regulatory function"). |
| **Who can apply?** | Any participating organisation established in a Programme Country can be the applicant. This organisation applies on behalf of all participating organisations involved in the project. |

[112] The beneficiary must publish all educational materials produced with Erasmus+ funding free of charge and under an open license.

[113] A way by which the owner of a work grants permission to everyone to use share and adapt the resource. A licence is associated to each resource. An open licence is not a transfer of copyrights or Intellectual Property Rights (IPR) and the benefit.

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| **Number and profile of participating organisations** | The Sector Skills Alliance must cover **at least 4 Programme Countries** and include **at least 8 full partners**, out of which at least 3 are **companies, industry or sector representatives** (e.g. chambers or trade associations), and at least 3 are **education and training providers.** |
| **Eligible sectors** | All sectors[114] except the six sectors that are eligible under Lot 3. |
| **Duration of project** | 2 or 3 years. The duration has to be chosen at application stage, based on the objective of the project and on the type of activities planned over time.<br><br>In exceptional cases, the duration of a Sector Skills Alliance may be extended, upon request by the beneficiary and with the agreement of the Executive Agency, of up to 6 months. In such a case, the total grant will not change. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **28 February at 12pm (midday Brussels time)** for projects starting on 1 November or 1 December of the same year, or 1 January of the following year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

114 They are defined by the Eurostat NACE – Statistical classification of economic activities in the European Union.

**AWARD CRITERIA FOR LOT 2**

Proposals will be assessed against the following criteria:

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| **Relevance of the project**<br><br>**(maximum 25 points)** | ▪ Link to EU policy and initiatives: the proposal takes into account and contributes to achieving the European objectives in the field of VET; the proposal takes into account and contributes to giving visibility to existing EU tools and initiatives for skills development; draws on the work of a European Sector Skills Council where relevant;<br>▪ VET representation: the Sector Skills Alliance includes partners that adequately represent VET design and delivery;<br>▪ Sector representation: the Sector Skills Alliance includes partners that adequately represent the sector concerned;<br>▪ Digital skills: extent to which the proposal integrates digital skills in the training content for one, or several related, professional profiles. Proposals including this aspect will be considered highly relevant;<br>▪ Green skills: extent to which the proposal integrates skills linked to the transition to a circular and greener economy in the training content for one, or several related, professional profiles. Proposals including this aspect will be considered highly relevant;<br>▪ Purpose: the proposal is relevant to the objectives of the Action (see section "What are the aims of a Sector Skills Alliance");<br>▪ Consistency: the objectives are based on a sound needs analysis; they are clearly defined, realistic and address issues relevant to the participating organisations and to the Action;<br>▪ Innovation: the proposal considers state-of-the-art methods and techniques, and leads to innovative results and solutions;<br>▪ European added value: the proposal demonstrates clearly the added value generated through its trans-nationality. |
| **Quality of the project design and implementation**<br><br>**(maximum 30 points)** | ▪ Coherence: the overall project design ensures consistency between project objectives, methodology, activities and budget proposed. The proposal presents a coherent and comprehensive set of appropriate activities to meet the identified needs and lead to the expected results;<br>▪ Structure: the work programme is clear and intelligible, and covers all phases (preparation, implementation, exploitation, monitoring, evaluation and dissemination);<br>▪ Methodology: the proposal is compliant and makes use of EU instruments and tools related to skills and occupations such as the EQF[115], ECVET[116], EQAVET[117], Europass[118], EURES[119], Drop 'Pin[120], ESCO[121], etc.. Whenever possible, the proposal takes into consideration and capitalizes on previous relevant activities (e.g. Programme Countries initiatives, Knowledge Innovation Communities-KIC of the EIT[122], previous and on-going Sector Skills Alliances[123]. It uses the learning outcomes approach, ECVET (units of learning outcomes) and quality assurance principles in line with EQAVET;<br>▪ Management: solid management arrangements are foreseen. Timelines, organisation, tasks and responsibilities are well defined and realistic. The proposal allocates appropriate resources to each activity;<br>▪ Budget: the budget provides for appropriate resources necessary for success, it is neither overestimated nor underestimated;<br>▪ The quality of arrangements for the recognition and validation of participants' learning outcomes, in line with European transparency and recognition tools and principles;<br>▪ Financial and quality control: control measures (continuous quality evaluation, peer reviews, benchmarking activities, etc.) and quality indicators ensure that the project implementation is of high quality and cost-efficient. Challenges/risks of the project are clearly identified and mitigating actions properly addressed. Expert review processes are planned as an integral part of the project. The Alliance work programme includes an independent external quality assessment at mid-term and at the end of the project. |

115 http://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A32008H0506(01)
116 http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1473612465372&uri=CELEX:32009H0708(02)
117 http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1473612641346&uri=CELEX:32009H0708(01)
118 http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1473612732264&uri=CELEX:32004D2241
119 https://ec.europa.eu/eures/public/homepage
120 https://ec.europa.eu/eures/public/en/opportunities
121 https://ec.europa.eu/esco/portal/home
122 https://eit.europa.eu/activities/innovation-communities
123 https://ec.europa.eu/programmes/erasmus-plus/opportunities-for-organisations/innovation-good-practices/sector-skills-alliances

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| **Quality of the project team and the cooperation arrangements**<br><br>**(maximum 25 points)** | ▪ Configuration: the composition of the partnership is in line with the project objectives, bringing together as relevant the expertise and competences required in curriculum design, qualification standards design, training delivery methodology and training policy. The representativeness and expertise of the partners in the sector concerned and at European level is convincingly demonstrated. The partners combine systemic and sector-related information with a solid knowledge of skills needs and training practices in their economic sector. The participation of European social partners and/or national social partners in the countries covered by the Alliance with a clear attribution of a role to develop the curriculum/a and ensure work-based learning is highly relevant. The spread and representativeness of relevant partners over the Programme Countries involved in the Alliance should be such that the Alliance has high implementation capacity in the countries covered by the Alliance (e.g. through the participation of a European sector organisation or European social partners) If the proposal also involves bodies with regulatory function in VET it will be considered highly relevant;<br>▪ Commitment: the distribution of responsibilities and tasks is clear, appropriate, and demonstrates the commitment and active contribution of all participating organisations in relation to their specific expertise and capacity;<br>▪ Tasks: the coordinator shows high quality management and coordination of transnational networks and leadership in complex environment. Individual tasks are allocated on the basis of the specific know-how of each partner;<br>▪ Collaboration/Team spirit: an effective mechanism is proposed to ensure a good coordination, decision-making and communication between the participating organisations, participants and any other relevant stakeholder. |
| **Impact and dissemination**<br><br>**(maximum 20 points)** | ▪ Exploitation: the proposal demonstrates how the outcomes of the Alliance will be used by the partners and other stakeholders. It provides means to measure exploitation within the project lifetime and after;<br>▪ Dissemination: the proposal provides a clear plan for the dissemination of results, and includes appropriate activities and their timing, tools and channels to ensure that the results and benefits will be spread effectively to the stakeholders, policy makers, guidance professionals, enterprises and young learners in compulsory education concerning occupations with high labour market demand or new business creation potential; within and after the project's lifetime; the proposal indicates which partners will be responsible for dissemination and demonstrates the relevant experience that they have in dissemination activities;<br>▪ Impact: the proposal shows societal and economic relevance and outreach. It includes partners with a significant role in the sector concerned including in education and training. It includes measures as well as targets and indicators to monitor progress and assess the expected impact (short- and long-term); if bodies with regulatory function (in particular on qualifications) are convincingly involved to ensure recognition or certification of the training content the proposal is highly relevant. If a European sectoral umbrella organisation representing either social partners or the sector concerned is a full partner, the proposal is highly relevant;<br>▪ Open access[124]: If relevant, the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences[125] and does not contain disproportionate limitations;<br>▪ Sustainability: the proposal explains how the action plan for the roll-out at national and regional levels will be developed. The proposal includes appropriate measures and the identification of financial resources (European, national and private) to ensure that the results and benefits achieved by the Alliance will have a long-term sustainability. |

To be considered for funding, proposals must score at least 70 points. Furthermore, they must score minimum 13 points for the categories "relevance of the project" and "quality of the project team and cooperation arrangements"; 16 points for the category "quality of the project design and implementation", and 11 points for the category "impact and dissemination".

[124] The beneficiary must publish all educational materials produced with Erasmus+ funding free of charge and under an open license.

[125] A way by which the owner of a work grants permission to everyone to use share and adapt the resource. A licence is associated to each resource. An open licence is not a transfer of copyrights or Intellectual Property Rights (IPR) and the benefit.

## LOT 3: SECTOR SKILLS ALLIANCES FOR IMPLEMENTING A NEW STRATEGIC APPROACH (BLUEPRINT) TO SECTORAL COOPERATION ON SKILLS

### ELIGIBILITY CRITERIA FOR LOT 3

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| **Eligible participating organisations** | The following organisations, with its affiliated entities (if any), are eligible to take part in a Lot 3- Alliance. They can be public or private organisations established in a Programme Country (see section "Eligible Countries" in Part A of this Guide).<br>▪ public or private enterprises active in the selected sectors especially those with an own training department, those providing apprenticeships, and those providing shared training (collaborative training);<br>▪ EU or national organisations representing industry, small and medium-sized enterprises, relevant sectoral organisations;<br>▪ public or private education or training providers, including training centres and higher education institutions;<br>▪ networks of education or training providers and European or national organisations representing them;<br>▪ authorities responsible for education and training or employment, at regional or national level, and related Ministries;<br>▪ organisations or networks – at EU or national level – representing social partners, industry, sectoral organisations, professions and education and training stakeholders, including youth organisations;<br>▪ chambers of commerce, of industry, of labour and other relevant sectoral intermediary bodies;<br>▪ sector skills councils;<br>▪ economic development agencies, statistical bodies and research institutes;<br>▪ bodies providing career guidance, professional counselling, information services and employment services;<br>▪ accreditation, certification, recognition or qualification bodies (bodies with "regulatory function");<br>▪ bodies representing relevant authorities at regional and national level. |
| **Who can apply?** | Any participating organisation established in a Programme Country can be the applicant. This organisation applies on behalf of all participating organisations involved in the project. |
| **Number and profile of participating organisations** | The Sector Skills Alliance must cover **at least 8 Programme Countries** and include **at least 12 full partners**, out of which at least **5** are **companies, industry or sector representatives** (e.g. chambers, trade unions or trade associations), and at least **5** are **education and training providers.** |
| **Eligible sectors** | 1. Additive manufacturing<br>2. Construction<br>3. Maritime shipping<br>4. Paper-based value chain<br>5. Renewable energy & green technologies<br>6. Steel industry |
| **Duration of project** | 4 years.<br>In exceptional cases, the duration of a Sector Skills Alliance may be extended, upon request by the beneficiary and with the agreement of the Executive Agency, of up to 6 months. In such a case, the total grant will not change. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **28 February at 12pm (midday Brussels time)** for projects starting on 1 November or 1 December of the same year, or 1 January of the following year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

### Additional information that must be taken into account per sector in Lot 3 projects

Regarding LOT 3 - Sector Skills Alliances for implementing a new strategic approach (Blueprint) to sectoral cooperation on skills, the following information must be taken into account for each of the sectors:

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| **Additive manufacturing**[126] | The Alliance must include at least the following areas:<br>i. 3D Printing, jetting technologies, photopolymerisation, powder bed fusion, material extrusion, directed energy deposition.<br>ii. Established Manufacturing industries in transition towards industrial modernisation, e.g. injection moulding, machining, forming and joining.<br>iii. Creative industries, e.g. industrial and graphic design, software development, 3D publishing.<br><br>To ensure complementarity and synergies, activities must be compatible with existing evidence for the sector, including the actions and orientations provided by:<br>• The 2012 Communication on Industrial Policy "A Stronger European Industry for Growth and Economic Recovery"[127]<br>• The 2014 report on AM from Directorate-General for Research and Innovation on Additive Manufacturing[128]<br>• The 2014 Communication, "For a European Industrial Renaissance"[129]<br>• The 2015 EESC own-initiative opinion on 3D-Printing[130]<br>• The 2015 ITRE study about 3D-Printing from the European Parliament[131]<br>• The 2016 Call for Proposals H2020 FoF-05-2016[132]<br>• Sector Skills Alliances projects, financed by ERASMUS+: 3DPrism[133] and Metals[134] as well as other Erasmus+ cooperation projects[135].<br>• The 2016 Communication "Digitising European Industry" [136]<br>• The 2017 Mid-Term Review on implementation of the Digital Single Market Strategy[137] |
| **Construction**[138] | The Alliance must include at least the following areas:<br>i. energy efficiency;<br>ii. digitalisation;<br>iii. circular economy including bio-based and secondary recycled products.<br><br>To ensure complementarity and synergies, activities must be compatible with existing initiatives and evidence for the sector, including the actions and orientations provided by:<br>• The sectoral competitiveness strategy[139] - the Communication "Strategy for the sustainable competitiveness of the construction sector and its enterprises"[140]<br>• Market and policy developments as described by **the European Construction Sector Observatory**[141]<br>• The Communication "Clean Energy For All Europeans"[142] and its Annex 1 "Accelerating clean energy in buildings"[143]<br>• **Outputs from** the BUILD UP Skills initiative[144] |
| **Maritime shipping** | The Alliance must include at least the following areas: |

[126] The Additive Manufacturing industry relates to the production of consumer and industrial goods for a broad range of applications, including the Original Equipment Manufacturers (OEM) and the Material suppliers. This sector includes companies from a wide range of economic activities, e.g. industrial machinery, aviation, health, tools, metal fabrication, electronics.
[127] http://ec.europa.eu/transparency/regdoc/rep/1/2012/EN/1-2012-582-EN-F1-1.Pdf
[128] https://publications.europa.eu/en/publication-detail/-/publication/6aeec19c-265f-11e7-ab65-01aa75ed71a1/language-en/format-PDF/source-30968908
[129] http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52014DC0014
[130] http://www.eesc.europa.eu/?i=portal.en.ccmi-opinions.32834
[131] http://www.europarl.europa.eu/RegData/etudes/STUD/2015/563445/IPOL_STU%282015%29563445_EN.pdf
[132] http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/topics/fof-05-2016.html
[133] http://3dprism.eu/
[134] http://www.metalsalliance.eu/objectives/
[135] On-going projects on additive manufacturing: http://ec.europa.eu/programmes/erasmus-plus/projects?pk_campaign=Web-ErasmusplusEN&pk_kwd=valor-projects-results#search/keyword=additive%20manufacturing&options[0]=ongoing&programmes[0]=31046216&actions[0]=31046221&matchAllCountries=false
On-going projects on 3D printing: http://ec.europa.eu/programmes/erasmus-plus/projects?pk_campaign=Web-ErasmusplusEN&pk_kwd=valor-projects-results#search/keyword=3D%20printing&options[0]=ongoing&programmes[0]=31046216&actions[0]=31046221&matchAllCountries=false;
Completed projects: http://ec.europa.eu/programmes/erasmus-plus/projects?pk_campaign=Web-ErasmusplusEN&pk_kwd=valor-projects-results#search/keyword=3D%20printing&options[0]=finalized&programmes[0]=31046216&actions[0]=31046221&matchAllCountries=false
[136] http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52016DC0180
[137] http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1496330315823&uri=CELEX:52017DC0228
[138] For the purpose of this call, construction refers to the economic activities covered by NACE classification F – Construction and to some activities under NACE C – Manufacturing and NACE E - Water supply; sewerage; waste management and remediation activities, which are construction-related (as defined by the NACE rev.2 ).
[139] http://ec.europa.eu/growth/sectors/construction/competitiveness_en
[140] http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52012DC0433
[141] http://ec.europa.eu/growth/sectors/construction/observatory_en
[142] http://ec.europa.eu/energy/sites/ener/files/documents/com_860_final.pdf
[143] https://ec.europa.eu/energy/sites/ener/files/documents/1_en_annexe_autre_acte_part1_v9.pdf
[144] http://www.buildup.eu/en/skills

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| | i. Seafarers;<br>ii. On-shore workers (e.g. staff of shipping companies).<br><br>Port, fishing and inland waterway sectors are excluded.<br><br>To ensure complementarity and synergies, activities must be compatible with existing initiatives and evidence for the sector, including the actions and orientations provided by:<br>• The ongoing SKILLFUL research project[145]<br>• The Vasco da Gama project[146]<br>• The KNOW-ME project[147]<br>• The HORIZON project[148] |
| **Paper-based value chain** | The Alliance must include at least the following areas:<br>i. Traditional sectors, including: pulp & paper manufacturing & related operations;<br>ii. Emerging sectors, such as: innovative processes, bio-refineries, bio-based products.<br><br>To ensure complementarity and synergies, activities must be compatible with existing initiatives and evidence for the sector, including the actions and orientations provided by:<br>• Road Map for moving to a competitive low-carbon economy in 2050, COM 2011/112[149];<br>• Unfold the future, CEPI, 2011, 2016[150];<br>• A Blueprint for the EU Forest-based Industries, SWD (2013) 343[151];<br>• Future Skills for the Paper Industry, a joint study by CEPI and IndustriAll[152] |
| **Renewable energy & green technologies** | The Alliance must include at least the following renewable electricity, heating & cooling, transport and energy infrastructure areas:<br>i. Residential heating & cooling and electricity (small scale wind, rooftop and building integrated PV, biomass boilers and bio- and renewable based CHP, solar thermal, heat pumps and residential cooling, demand response, storage and micro-grid);<br>ii. Industrial and commercial scale heating & cooling and electricity (wind farms, PV farms, CSP, large and small scale hydropower, Geothermal, Solar Thermal for heating and cooling, Heat pumps, thermal networks);<br>iii. Waste, biofuels and biomass (biogas, advanced biofuels, solid biomass and biomass fuels (liquid, gaseous) and other renewable low-carbon fuels, renewable urban waste);<br>iv. Ocean and offshore renewable energy;<br>v. Energy system integration and development (electricity grid, flexibility & storage; integration, electro-mobility and low-carbon transport system).<br><br>To ensure complementarity and synergies, activities must be compatible with existing initiatives and evidence for the sector, including the actions and orientations provided by:<br>• The Clean Energy for all Europeans Package[153]<br>• The Energy Union Framework Strategy[154]<br>• The EU Heating and Cooling Strategy[155]<br>• Secure Clean and Competitive Energy area of the EU Horizon 2020 Framework Programme for Research and Innovation, Work Programmes 2014-2015 and 2016-2017[156]<br>• The EU Renewable Energy Directive[157] and its recast[158]<br>• The Energy Efficiency Directive[159] and its amendment[160]<br>• The Energy Performance of Buildings Directive[161] and its amendment[162]<br>• Commission Communication on Accelerating Clean Energy Innovation[163]<br>• Commission Communication on a European Strategy for Low-Emission Mobility[164] |

[145] http://cordis.europa.eu/project/rcn/205822_en.html
[146] http://www.vasco-da-gama.eu/
[147] http://www.know-me.org/
[148] http://www.warsashacademy.co.uk/about/our-expertise/maritime-research-centre/horizon-project/horizon-project.aspx
[149] HTTP://EUR-LEX.EUROPA.EU/LEGAL-CONTENT/EN/TXT/?URI=CELEX:52011DC0112
[150] HTTP://WWW.UNFOLDTHEFUTURE.EU/
[151] HTTP://EUR-LEX.EUROPA.EU/LEGAL-CONTENT/FR/TXT/?URI=CELEX:52013SC0343
[152] HTTP://WWW.CEPI.ORG/NODE/20917
[153] https://ec.europa.eu/energy/en/news/commission-proposes-new-rules-consumer-centred-clean-energy-transition.
[154] A Framework Strategy for a Resilient Energy Union with a Forward-Looking Climate, Commission Communication, COM(2015) 80 final, 25. See more information at: https://ec.europa.eu/commission/priorities/energy-union-and-climate_en
[155] An EU Strategy on Heating and Cooling, Commission Communication, COM(2016) 51 final, 16.2.2016.
[156] https://ec.europa.eu/programmes/horizon2020/en/h2020-section/secure-clean-and-efficient-energy.
[157] Directive 2009/28/EC on the promotion of the use of energy from renewable sources, OJ L 140, 5.6.2009.
[158] Proposal for a Directive on the promotion of the use of energy from renewable sources (recast), COM(2016) 767 final/2, 23.2.2017.
[159] Directive 2012/27/EU on energy efficiency, OJ L 315, 14.11.2012.
[160] Proposal for a Directive amending Directive 2012/27/EU on energy efficiency, COM(2016) 761 final, 30.11.2016.
[161] Directive 2010/31/EU on the energy performance of buildings, OJ L 153, 18.6.2010.
[162] Proposal for a Directive amending Directive 2010/31/EU on the energy performance of buildings, COM(2016) 765 final, 30.11.2016.
[163] Accelerating Clean Energy Innovation, Commission Communication, COM(2016) 763 final, 30.11.2016
[164] A European Strategy for Low-Emission Mobility, Commission Communication, COM(2016) 501 final, 20.7.2016.

| | |
|---|---|
| | • Fuel Cells and Hydrogen Joint Undertaking[165]<br>• BUILD UP Skills Initiative[166] |
| **Steel industry[167]** | The Alliance must include at least the following areas:<br>i. Technologies for steelmaking (Basic Oxygen Furnace (BOF) and Electric Arc Furnace (EAF) routes)<br>ii. Innovative technologies for low carbon steelmaking (i.e. Carbon Direct Avoidance by using hydrogen, electricity (CDA), process integration with or without Carbon Capture and Storage (CCS), and Carbon Capture Utilisation (CCU))<br>iii. Innovative technologies related to IT literacy and industry 4.0 (e.g. digitisation and data management, just-in-time production, 3-Ds applications).<br>To ensure complementarity and synergies, activities must be compatible with existing initiatives and evidence for the sector, as well as orientations included in the following documents:<br>• COM(2013) 407 ("Action Plan for a competitive and sustainable steel industry in Europe")[168]<br>• COM(2016) 155 ("Steel: Preserving sustainable jobs and growth in Europe")[169]<br>• COMMISSION REGULATION (EU) No 651/2014: definition of steel[170]<br>• EC report - The future of European Steel – Innovation and sustainability in a competitive world and EU circular economy[171]<br>• 2015 and 2016 Synopsis of projects funded under the Research Fund for Coal and Steel (RFCS)[172]<br>• The Call for proposals 'Research Programme of the Research Fund for Coal and Steel'[173]<br>• The Call for proposals 'H2020 LEIT-NMBP-Sustainable Process Industry (SPIRE)'[174] |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

[165] http://www.fch.europa.eu/
[166] http://www.buildup.eu/en/skills
[167] The steel industry encompasses activities under the following NACE codes: C24.1 (manufacture of basic iron and steel and of ferro-alloys ); C24.2 (manufacture of tubes, pipes, hollow profiles and related fittings, of steel); C24.3 (manufacture of other products of first processing of steel)..
[168] HTTP://EUR-LEX.EUROPA.EU/LEGAL-CONTENT/EN/TXT/?URI=CELEX%3A52013DC0407
[169] HTTP://EUR-LEX.EUROPA.EU/LEGAL-CONTENT/EN/TXT/?QID=1498811071233&URI=CELEX:52016DC0155
[170] HTTP://EUR-LEX.EUROPA.EU/LEGAL-CONTENT/EN/TXT/?URI=URISERV%3AOJ.L_.2014.187.01.0001.01.ENG
[171] HTTPS://PUBLICATIONS.EUROPA.EU/EN/PUBLICATION-DETAIL/-/PUBLICATION/F5A82742-2A44-11E7-AB65-01AA75ED71A1 OR HTTP://EC.EUROPA.EU/RESEARCH/INDEX.CFM?PG=EVENTS&EVENTCODE=5FC19929-EAC3-7F44-A953BB390CF82DB8
[172] HTTP://EC.EUROPA.EU/RESEARCH/INDUSTRIAL_TECHNOLOGIES/RFCS_PUBS.HTML
[173] HTTP://EC.EUROPA.EU/RESEARCH/INDUSTRIAL_TECHNOLOGIES/RFCS_PARTICIPATE.HTML
[174] HTTP://EC.EUROPA.EU/RESEARCH/INDUSTRIAL_TECHNOLOGIES/PPP-IN-RESEARCH_EN.HTML

**AWARD CRITERIA FOR LOT 3**

Proposals will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project**<br><br>**(maximum 25 points)** | ▪ Link to EU policy and initiatives: the proposal takes into account and contributes to achieving the European objectives in the field of VET; takes into account and contributes to give visibility to existing EU tools and initiatives for skills development; draws on the work of a European Sector Skills Council where relevant;<br>▪ Education representation: the Alliance includes partners that adequately represent education providers;<br>▪ Sector representation: the Alliance includes partners that adequately represent the sector concerned;<br>▪ Digital and key-enabling technologies (KETs) skills: extent to which the proposal integrates these skills in the training content for one, or several related, professional profiles. Proposals including this aspect will be considered highly relevant;<br>▪ Green and Blue skills: extent to which the proposal integrates skills linked to the transition to a circular and greener economy, both in terms of skills needs and in terms of training content for one, or several related, professional profiles. Proposals including this aspect will be considered highly relevant;<br>▪ Purpose: the proposal is relevant to the objectives of the action, themes and activities described in section 2. The proposal contributes to building transnational networks and cooperation tools between relevant stakeholders to adapt education to emerging needs of the sector's industry;<br>▪ Consistency: the objectives are based on a sound needs analysis; they are clearly defined, realistic and address issues relevant to the participating organisations and to the action;<br>▪ Innovation: the proposal considers state-of-the-art methods and techniques, and leads to innovative results and solutions;<br>▪ European added value: the proposal demonstrates clearly the added value generated through its trans-nationality. |
| **Quality of the project design and implementation**<br><br>**(maximum 30 points)** | • Coherence: the overall project design ensures consistency between project objectives, methodology, activities and budget proposed. The proposal presents a coherent and comprehensive set of appropriate, concrete and practical activities to meet the identified needs and lead to the expected results;<br>• Structure: the work programme is clear and intelligible, and covers all phases (preparation, implementation, exploitation, monitoring, evaluation and dissemination);<br>• Methodology: the proposal is compliant and makes use of EU instruments and tools related to skills and occupations such as the EQF[175], ECVET[176], EQAVET[177], Europass[178], EURES[179], Drop 'Pin[180], ESCO[181], etc.. Whenever possible, the proposal takes into consideration and capitalizes on previous relevant activities (e.g. Programme Countries initiatives, Knowledge Innovation Communities-KIC of the EIT[182], Sector Skills Alliances[183]. It uses the learning outcomes approach, ECVET (units of learning outcomes) and quality assurance principles in line with EQAVET;<br>• Management: solid management arrangements are foreseen. Timelines, organisation, tasks and responsibilities are well defined and realistic. The proposal allocates appropriate resources to each activity;<br>• Budget: the budget provides for appropriate resources necessary for success, it is neither overestimated nor underestimated;<br>• The quality of arrangements for the recognition and validation of participants' learning outcomes, in line with European transparency and recognition tools and principles;<br>• Financial and quality control: control measures (continuous quality evaluation, expert peer reviews, benchmarking activities, etc.) and quality indicators ensure that the project implementation is of high quality and cost-efficient. Challenges/risks of the project are clearly identified and mitigating actions properly addressed. Expert review processes are planned as an integral part of the project. The Alliance work programme includes an independent external quality assessment at mid-term and at the end of the project. |

175 HTTP://EUR-LEX.EUROPA.EU/LEGAL-CONTENT/EN/ALL/?URI=CELEX%3A32008H0506(01)
176 HTTP://EUR-LEX.EUROPA.EU/LEGAL-CONTENT/EN/TXT/?QID=1473612465372&URI=CELEX:32009H0708(02)
177 HTTP://EUR-LEX.EUROPA.EU/LEGAL-CONTENT/EN/TXT/?QID=1473612641346&URI=CELEX:32009H0708(01)
178 HTTP://EUR-LEX.EUROPA.EU/LEGAL-CONTENT/EN/TXT/?QID=1473612732264&URI=CELEX:32004D2241
179 HTTPS://EC.EUROPA.EU/EURES/PUBLIC/HOMEPAGE
180 https://ec.europa.eu/eures/public/en/opportunities
181 HTTPS://EC.EUROPA.EU/ESCO/PORTAL/HOME
182 HTTPS://EIT.EUROPA.EU/ACTIVITIES/INNOVATION-COMMUNITIES
183 https://ec.europa.eu/programmes/erasmus-plus/opportunities-for-organisations/innovation-good-practices/sector-skills-alliances

| | |
|---|---|
| **Quality of the project team and the cooperation arrangements**<br><br>**(maximum 25 points)** | • Configuration: the composition of the Alliance is in line with the project objectives, bringing together as relevant the expertise and competences required in skills identification and anticipation, skills supply, curriculum design, qualification standards design, training delivery methodology and training policy. The partners combine systemic and sector-related information with a solid knowledge of skills needs and training practices in their economic sector. The Alliance ensures adequate representativeness of the whole sector: the representativeness and expertise of the partners in the sector concerned and at European level is convincingly demonstrated. The participation of European social partners and/or national social partners in the countries covered by the Alliance is highly relevant. The geographical spread and representativeness of relevant partners over the Programme Countries involved in the Alliance should be such that the Alliance has high implementation capacity in the countries covered (e.g. through the participation of a European sector organisation and/or European social partners). If the proposal also involves bodies with regulatory function in Education and training it will be considered highly relevant;<br>• Commitment: the distribution of responsibilities and tasks is clear, appropriate, and demonstrates the commitment and active contribution of all participating organisations in relation to their specific expertise and capacity;<br>• Tasks: the coordinator shows high quality management and coordination of transnational networks and leadership in complex environment. Individual tasks are allocated on the basis of the specific know-how of each partner;<br>• Collaboration/Team spirit: an effective mechanism is proposed to ensure a good coordination, decision-making and communication between the participating organisations, participants and any other relevant stakeholder. |
| **Impact and dissemination**<br><br>**(maximum 20 points)** | • Exploitation: the proposal demonstrates how the outcomes of the Alliance will be rolled out in the partner countries;<br>• Dissemination: the proposal provides a clear plan for the dissemination of results, and includes appropriate activities and their timing, tools and channels to ensure that the results and benefits will be spread effectively to the stakeholders, policy makers, guidance professionals, enterprises and young learners in compulsory education concerning occupations with high labour market demand or new business creation potential within and after the project's lifetime; the proposal details how concrete examples of best practice will be identified, documented and disseminated; the proposal indicates which partners will be responsible for dissemination and demonstrates the relevant experience that they have in dissemination activities;<br>• Impact: the proposal shows societal and economic relevance and outreach. It includes partners with a significant role in the sector concerned including in education and training. It includes measures as well as targets and indicators to monitor progress and assess the expected impact (short- and long-term). It includes **bodies with regulatory functions** (in particular on Qualifications**)** that are actively involved to ensure the recognition or certification of the training content of the proposal. If a **European sectoral umbrella organisation** representing either social partners or the sector concerned is a full partner, the proposal is considered highly relevant;<br>• Open access: if relevant, the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences and in linked open data format, and does not contain disproportionate limitations;<br>• Sustainability: the proposal explains how the *action plan* for the roll-out at national and regional levels will be developed. The proposal includes appropriate measures and the identification of financial resources (European, national and private) to ensure that the results and benefits achieved by the Alliance will have a long-term sustainability beyond the project lifetime. |

To be considered for funding, proposals must score at least 70 points. Furthermore, they must score minimum 13 points for the categories "relevance of the project" and "quality of the project team and cooperation arrangements"; 16 points for the category "quality of the project design and implementation", and 11 points for the category "impact and dissemination".

## WHAT ELSE SHOULD YOU KNOW ABOUT THIS ACTION?

Quality assurance is vital in order to ensure that Alliances successfully deliver their results and achieve an impact going far beyond the partner organisations themselves. Alliances are expected to achieve results which are widely transferable within the economic sector concerned. Therefore, Alliances need to provide a sound quality management plan.

Alliances should also implement expert review processes as an integral part of the project. The Alliance work programme should therefore include an independent external quality assessment at mid-term and at the end of the project, to be

submitted together with the project progress and final report respectively. In its progress report, the participating organisations will have to demonstrate the follow-up actions resulting from the recommendation of the mid-term quality assessment.

All Alliances are required to undertake targeted dissemination activities, notably through organisations/bodies providing professional guidance/orientation. They will have to provide a comprehensive dissemination plan including:

- an active dissemination strategy to reach out to stakeholders, policy makers, guidance professionals, enterprises and young learners in compulsory education concerning occupations with high labour market demand or new business creation potential;
- mainstreaming the results throughout the sector;
- making the results of the Alliance available through open licences.

The dissemination plan should clearly explain how the planned project results will be disseminated, including definition of the targets, the objectives, the means to be used and the relevant timing. Applications should also indicate which partner will be responsible for dissemination and demonstrate the relevant experience that they have in dissemination activities. Selected projects will have to produce a short publishable summary of the project activities at the end of the project to be published in the Programme dissemination tool.

Sector Skills Alliances are a recent and ambitious action; they are subject to a particular monitoring which requires active participation from all participants and stakeholders. Sector Skills Alliances have to foresee their participation in meetings and events organised by the Education, Audiovisual and Culture Executive Agency and the European Commission. A budget for up to 3 meetings per year has to be planned.

**WHAT ARE THE FUNDING RULES?**

The budget of the project must be drafted according to the following funding rules (in euro):

| | |
|---|---|
| **Maximum EU contribution awarded for a Lot 1 - Sector Skills Alliance for skills needs identification (2 years):** | **330 000 EUR** |
| **Maximum EU contribution awarded for a Lot 1 - Sector Skills Alliance for skills needs identification (3 years):** | **500 000 EUR** |
| **Maximum EU contribution awarded for a Lot 2 – Sector Skills Alliance for design and delivery of VET (2 years):** | **700 000 EUR** |
| **Maximum EU contribution awarded for a Lot 2 – Sector Skills Alliance for design and delivery of VET (3 years):** | **1 000 000 EUR** |
| **Maximum EU contribution awarded for a Lot 3 – Sector Skills Alliance for implementing a new strategic approach (Blueprint) to sectoral cooperation on skills (4 years):** | **4 000 000 EUR** |

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Implementation support** | Contribution to any activity directly linked to the implementation of the project including: project management, project meetings, intellectual outputs (such as curricula, pedagogical materials, open educational resources (OER), IT tools, analyses, studies, etc.), dissemination, participation in events, conferences, travel, etc.<br>The number of days and the profile of staff involved by country is the basis for the calculation of the EU contribution. | Contribution to unit costs | B3.1 per manager involved per day of work on the project | Conditional: applicants will have to justify the type and volume of resources needed in relation to the implementation of the proposed activities and outputs.<br>The outputs should be substantial in quality and quantity to qualify for this type of grant support. |
| | | | B3.2 per researcher/ teacher/trainer involved per day of work on the project | |
| | | | B3.3 per technician involved per day of work on the project | |
| | | | B3.4 per administrative staff involved per day of work on the project | |

**TABLE A - PROJECT IMPLEMENTATION (AMOUNTS IN EURO PER DAY) IN PROGRAMME COUNTRIES**

The amounts depend on: a) profile of staff engaged in the project and b) the country of the participating organisation whose staff is engaged.

| | Manager | Teacher/Trainer/Researcher/ Youth worker | Technician | Administrative staff |
|---|---|---|---|---|
| | B3.1 | B3.2 | B3.3 | B3.4 |
| **Denmark, Ireland, Luxembourg, Netherlands, Austria, Sweden, Liechtenstein Norway** | 353 | 289 | 228 | 189 |
| **Belgium, Germany, , France, Italy, Finland, United Kingdom, Iceland** | 336 | 257 | 194 | 157 |
| **Czech Republic, Greece, Spain, Cyprus, Malta, Portugal, Slovenia** | 197 | 164 | 122 | 93 |
| **Bulgaria, Estonia, Croatia, Latvia, Lithuania, Hungary, Poland, Romania, Slovakia former Yugoslav Republic of Macedonia, Turkey** | 106 | 88 | 66 | 47 |

## CAPACITY BUILDING IN THE FIELD OF HIGHER EDUCATION

This action which aims to support the modernisation, accessibility and internationalisation of higher education in the Partner Countries is to be carried out in the context of the priorities identified in the Communications "Increasing the impact of EU Development Policy: an Agenda for Change"[184] and "European Higher Education in the World"[185].

It is implemented within the framework of the external policies of the EU, defined by the financial instruments of the European Union which support this action, namely the:

- European Neighbourhood Instrument (ENI)[186]
- Development Cooperation Instrument (DCI)[187]
- Instrument for Pre-accession Assistance (IPA)[188]
- European Development Fund

This action contributes to the development of sustainable and inclusive socio-economic growth in Partner Countries and should ensure development and EU external actions objectives and principles, including national ownership, social cohesion, equity, proper geographical balance and diversity. Special attention will be given to the least developed countries as well as to disadvantaged students from poor socio-economic backgrounds and to students will special needs.

The following section should be read in conjunction with Annex I of this present Guide (Specific rules and information relating to Capacity Building in the field of higher education)

### WHAT IS A CAPACITY-BUILDING PROJECT?

Capacity-building Projects are transnational cooperation projects based on multilateral partnerships, primarily between higher education institutions (HEIs) from Programme and eligible Partner Countries financed through the above-mentioned instruments. They can also involve non-academic partners to strengthen the links with society and business and to reinforce the systemic impact of the projects. Through structured cooperation, exchange of experience and good practices and individual mobility, Capacity-building Projects aim to:

- support the modernisation, accessibility and internationalisation of higher education in the eligible Partner Countries;
- support eligible Partner Countries to address the challenges facing their higher education institutions and systems, including those of quality, relevance, equity of access, planning, delivery, management and governance;
- contribute to cooperation between the EU and the eligible Partner Countries (and amongst the eligible Partner Countries);
- promote voluntary convergence with EU developments in higher education;
- promote people-to-people contacts, intercultural awareness and understanding.

These objectives are pursued in the eligible Partner Countries, through actions that:

- improve the quality of higher education and enhance its relevance for the labour market and society;
- improve the level of competences and skills in HEIs by developing new and innovative education programmes;
- enhance the management, governance and innovation capacities, as well as the internationalisation of HEIs;
- increase the capacities of national authorities to modernise their higher education systems, by supporting to the definition, implementation and monitoring of reform policies
- foster regional integration and cooperation across different regions[189] of the world through joint initiatives, sharing of good practices and cooperation.

[184] *"Increasing the impact of EU Development Policy: an Agenda for Change"*, Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Brussels, 13.10.2011, COM(2011) 637 final

[185] "*European Higher Education in the World*", Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Brussels, 11.07.2013 COM(2013) 499 final

[186] REGULATION (EU) No 232/2014 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 March 2014 establishing a European Neighbourhood Instrument
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2014:077:0027:0043:EN:PDF

[187] REGULATION (EU) No 233/2014 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 March 2014 establishing a financing instrument for development cooperation for the period 2014-2020
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2014:077:0044:0076:EN:PDF

[188] REGULATION (EU) No 231/2014 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 March 2014 establishing an Instrument for Pre-accession Assistance (IPA II)
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2014:077:0011:0026:EN:PDF

[189] In the framework of this action, a region is defined as a grouping of countries belonging to a certain macro-geographic area. The classification of regions applied under Erasmus+ is in line with the categorisations made by the different EU external action instruments.

Two categories of Capacity-building projects are supported:

**Joint Projects:** aimed at producing outcomes that benefit principally and directly the organisations from eligible Partner Countries involved in the project. These projects typically focus on three different types of activities:

- curriculum development;
- modernisation of governance, management and functioning of HEIs;
- strengthening of relations between HEIs and the wider economic and social environment.

**Structural Projects:** aimed at producing an impact on higher education systems and promoting reforms at national and/or regional level in the eligible Partner Countries. These projects typically focus on two different categories of activities:

- modernisation of policies, governance and management of higher education systems;
- strengthening of relations between higher education systems and the wider economic and social environment.

Capacity-building projects can be implemented as:

- National projects, i.e. projects involving institutions from only one eligible Partner Country;
- Multi-country projects within one single region, involving at least two countries from this region;
- Multi-country projects involving more than one region, involving at least one country from each region concerned.

### WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Erasmus+ offers a great deal of flexibility in terms of the activities that a Capacity-building Project can implement, as long as the proposal demonstrates that these activities are the most appropriate to reach the objectives defined for the project.

**Joint Projects** may typically carry out a wide range of activities, such as:

- development, testing and adaptation of:
  - curricula, courses, learning materials and tools;
  - learning and teaching methodologies and pedagogical approaches, especially those delivering key competences and basic skills, language skills, entrepreneurship education and focusing on the use of ICT;
  - new forms of practical training schemes and study of real-life cases in business and industry;
  - university-enterprise cooperation, including the creation of business start-ups;
  - new forms of learning and providing education and training, notably strategic use of open and flexible learning, virtual mobility, open educational resources and better exploitation of the ICT potential;
  - guidance, counselling and coaching methods and tools;
  - tools and methods for professionalization and professional development of academic and administrative staff;
  - quality assurance at programme and institution level;
  - new governance and management systems and structures;
  - modern university services e.g. for financial management, international relations, student counselling and guidance, academic affairs and research;
- strengthening of the internationalisation of HEI and the capacity to network effectively in research, scientific and technological innovation (international openness of curricula, student services, inter-institutional mobility schemes, scientific cooperation and knowledge transfer, etc.);
- upgrading of facilities necessary to the implementation of innovative practices (e.g. for new curricula and teaching methods, for the development of new services, etc.);
- organisation of staff trainings involving teaching and support staff, technicians as well as university administrators and managers.

Curriculum reform projects, in particular, are expected to include training for teaching staff and address related issues such as quality assurance and employability of graduates through links to the labour market. Study programmes must be officially accredited before the end of the project time life. The teaching of new or updated courses must start during the life-time of the project with an adequate number of students and retrained teachers and has to take place during at least one third of the project duration. Training during curriculum reform projects can also target administrative personnel such as library staff, laboratory staff and IT staff.

**Structural Projects** may typically carry out a wide range of activities, such as:

- strengthening of internationalisation of higher education systems;
- introduction of Bologna-type reforms (three-level cycle system, quality assurance, evaluation, etc.);

- implementation of transparency tools such as credit systems, accreditation procedures, guidelines for the recognition of prior and non-formal learning etc.;
- establishment of National Qualification Frameworks;
- development and implementation of internal and external quality assurance systems/guidelines;
- development and implementation of new approaches and tools for policy making and monitoring, including the establishment of representative bodies, organisations or associations;
- strengthening the integration of education, research and innovation.

In more concrete terms, these activities can include:

- surveys and studies on specific reform issues;
- policy and expert advice;
- organisation of conferences, seminars, workshops, round tables (which should result in operational conclusions and recommendations);
- organisation of staff trainings on policy issues;
- organisation of staff trainings (which may include the production of training manuals and guidelines) involving teaching and support staff, technicians as well as university administrators and managers;
- organisation of awareness-raising campaigns.

### WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN A CAPACITY-BUILDING PROJECT?

Depending on their objectives, Capacity-building projects should involve the most appropriate and diverse range of partners in order to benefit from their different experiences, profiles and specific expertise and to produce relevant and high quality project results. It will be important to ensure an equitable and active involvement of the different partners based on a suitable distribution of tasks and a clear demonstration of networking capacities and in order to increase impact, to be able to draw on all the different levels of the partnership and not just on individual participation.

Partners must submit mandates[190] signed between the coordinator and each partner, confirming that they grant power of attorney to the coordinator, to act in their name and for their account in signing the possible agreement and its subsequent riders with the Education, Audiovisual and Culture Executive Agency.

According to the scope and objectives of the Action, participating organisations from eligible Partner Countries are intended to be the target of the Capacity-building project. The activities and outcomes described in the proposal must be geared to benefit the eligible Partner Countries, their higher education institutions and systems.
HEIs from the eligible Partner Countries are encouraged to act as applicants, provided that they have the financial and operational capacity required.

Participating organisations from Programme Countries bring their expertise and experience in relation to the objectives of the project. Their role is to contribute towards achieving the objectives of the project and the needs of these institutions should not therefore feature in the project's design. Those organisations are eligible to receive a share of the budget in relation to the costs incurred by their role.

Additionally the Capacity-building in the field of higher education project may also benefit from the involvement of associated partners (optional). These organisations (for instance non-academic partners) contribute indirectly to the implementation of specific tasks/activities and/or support the dissemination and sustainability of the project. Such contribution may for example take the form of knowledge and skills transfer, the provision of complementary courses or possibilities for secondment or placement. Associated partners do not count for the minimum number of higher education institutions or Ministries required for the partnership composition. For contractual management issues, “associated partners” are not considered as part of the consortium and therefore are not considered as beneficiaries and their costs are not taken into account for the calculation of the EU grant.

190 The mandate duly signed by the legal representative of the partner organisation will be an annex to the Grant Agreement and has therefore legal force. The template provided by the Agency must be used in all cases without any modification or adjustment. Mandates must be provided using the template published with the official documents of the call for proposals.

## WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN A CAPACITY-BUILDING PROJECT IN THE FIELD OF HIGHER EDUCATION?

**Applicant/coordinator:** a participating organisation that submits the project proposal on behalf of all the partners. The coordinator has the full responsibility to ensure that the project is implemented in accordance with the agreement. Its coordinating covers the following duties:

- represents and acts on behalf of the project partners towards the European Commission;
- bears the financial and legal responsibility for the proper operational, administrative and financial implementation of the entire project;
- coordinates the project in cooperation with project partners.

**Full partners:** are those participating organisations from Programme or Partner Countries which contribute actively to the achievement of the Capacity Building project's objectives. Each full partner must sign a mandate to confer to the coordinating organisation the responsibility of acting as main beneficiary and act in his name during the implementation of the project

**Associated partners** (optional): Capacity-building projects can involve associated partners who contribute to the implementation of specific project tasks/activities or support the dissemination and sustainability of the project. For contractual management issues, "associated partners" are not considered as part of the partnership, and they do not receive funding, neither are they considered as regards the minimum requirements for consortium composition. However their involvement and role in the project and different activities have to be clearly described.

**Affiliated entities** (optional): Organisations which contribute to the achievement of project objectives and activities. Affiliated entities must be identified in the grant application and satisfy the requirements as described in Annex III (Glossary of terms) of this Programme Guide.

## WHAT ARE THE CRITERIA USED TO ASSESS A CAPACITY-BUILDING PROJECT?

Listed below are the formal criteria that a higher education Capacity-building project must respect in order to be eligible for an Erasmus+ grant:

### ELIGIBILITY CRITERIA

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| **Eligible Partner Countries** | Partner Countries belonging to Regions 1 to 4 and 6 to 11 included (see section "Eligible Countries" in Part A of this Guide). |
| **Eligible participating organisations**[191] | A participating organisation can be:<br>▪ any public or private organisation, with its affiliated entities (if any), offering full programmes leading to higher education degrees and recognised diplomas at tertiary education qualifications level[192] (defined as **higher education institution** and recognised as such by the competent authorities*);*<br>or<br>▪ any public or private organisation, with its affiliated entities (if any), active in the la- |

[191] The following types of organisations are not eligible:
- EU institutions and other EU bodies including specialised agencies (their exhaustive list is available on the website ec.europa.eu/institutions/index_en.htm);
- National Erasmus+ Offices in the eligible Partner Countries (in order to avoid a possible conflict of interests and/or double funding);
- Organisations managing EU programmes such as national agencies in the Programme Countries should refer to Part C of the present Guide

[192] International Standard Classification of Education (ISCED 2013), tertiary education, **at least** level 5. Post-secondary non-tertiary education ISCED 2011 level 4 is not accepted.

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| | bour market or in the fields of education, training and youth. For example, such organisation can be:<br>– a public, private small medium or large enterprise (including social enterprises);<br>– a public body at local, regional or national level (including ministries);<br>– a social partner or other representative of working life, including chambers of commerce, craft/professional associations and trade unions;<br>– a research institute;<br>– a foundation;<br>– a school/institute (on any level, from pre-school to upper secondary education, including vocational education and adult education);<br>– a non-profit organisation, association, NGO (including national or international associations or networks of higher education institutions, students or teachers associations, etc.);<br>– a cultural organisation, library, museum;<br>– a body providing career guidance, professional counselling and information services.<br><br>Each participating organisation must be established in a Programme Country or in an eligible Partner Country.<br><br>Higher education institutions (HEIs) located in a Programme Country must hold a **valid Erasmus Charter for Higher Education (ECHE)**. An ECHE is not required for participating HEIs in eligible Partner Countries.<br><br>**Associations or organisations of higher education institutions** dedicated to the promotion, improvement and reform of higher education as well as to co-operation within Europe and between Europe and other parts of the world are eligible. If such associations, organisations or networks also cover other education sectors and training, the main focus of their activities must be on higher education, which must be clearly reflected in the organisation statutes and governance structures. An association, organisation or network of higher education institutions will count as one legal entity/partner institution, meaning that it will be treated as one entity from the country where the headquarter is based. These organisations will not be considered as HEIs. Only those members which are established in the Programme or eligible Partner Countries can benefit from the grant.<br><br>**International governmental organisations** may participate as partners in Capacity-building projects on a self-financing basis.<br><br>**Specific provision for Ukraine**: In the case of Ukraine, eligible Higher Education Institutions are only those recognised by the Ministry of Education and Science of Ukraine (for further information please contact the National Erasmus+ Office in Ukraine). |
| **Who can apply?** | The following types of participating organisations can apply for a grant:<br>• a higher education institution;<br>• an association or organisation of higher education institutions;<br>• only for Structural Projects: a legally recognized national or international rector, teacher or student organisation.<br><br>established in a Programme or in an eligible Partner Country.<br><br>This organisation applies on behalf of all participating organisations involved in the project.<br><br>Exception: participating organisations from Libya and Syria (Region 3) as well as from the Russian Federation (Region 4) cannot act as applicants. |

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| **Number and profile of participating organisations** | Capacity-building projects must respect all of the following criteria:<br><br>**For projects addressing one Partner Country only** (national projects):<br><br>One eligible **Partner Country** and at least two **Programme Countries** must be involved in the project.<br><br>These projects must include, as full partners, a minimum number of HEIs, as follows:<br><br>• minimum one HEI from at least two of the Programme Countries taking part in the project;<br>• minimum three HEIs from the Partner Country taking part in the project.<br>• projects must include at least as many Partner Country HEIs as there are Programme Country HEIs.<br><br>Exception: in Partner Countries where the number of higher education institutions is lower than 5 in the whole country or in cases where one single institution represents more than 50% of the overall student population of the country, applications counting only one HEI for those countries will be accepted.<br><br>**For projects addressing two or more Partner Countries** (multi-country projects):<br><br>At least two eligible **Partner Countries** and at least two **Programme Countries** must be involved in the project. Partner Countries can be from the same region[193] or from different regions covered by the Action.<br><br>These projects must include, as full partners, a minimum number of HEIs, as follows:<br><br>• minimum one HEI from at least two of the Programme Countries taking part in the project;<br>• minimum two HEIs from each Partner Country taking part in the project;<br>• projects must include at least as many Partner Country HEIs as there are Programme Country HEIs.<br><br>Exception: in Partner Countries where the number of higher education institutions is lower than 5 in the whole country or in cases where one single institution represents more than 50% of the overall student population of the country, applications counting only one HEI for those countries will be accepted on the condition that the projects includes at least as many Partner Country HEIs as there are Programme Country HEIs.<br><br>Additional specific criteria applying to:<br><br>• Structural Projects: projects must also involve, as full partners, the Ministries responsible for higher education in each of the eligible Partner Countries targeted by the project.<br><br>• Projects involving partners from **Region 4 (Russian Federation)** must involve at least another Partner Country.<br><br>• Projects involving partners from **Region 8 (Latin America)**, must involve at least two Partner Countries from that region in the project. |

[193] In the framework of this action, a region is defined as a grouping of countries belonging to a certain macro-geographic area. The classification of regions applied under Erasmus+ is in line with the categorisations made by the different EU external action instruments.

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| **Other criteria** | Where an association, organisation or network of higher education institutions is involved, the requirements for the minimum number of participating organizations indicated above must be fulfilled, counting the association / organisation / network as only one partner from the country where the headquarters is based. **Please note that these organisations cannot be considered as HEIs.** |
| **Duration of project** | Capacity-building Projects can last two or three years. The duration must be chosen at application stage, based on the objective of the project and on the type of activities foreseen over time.<br>Only under exceptional circumstances, one extension of the eligibility period of maximum 12 months, may be granted if it becomes impossible for the coordinator to complete the project within the scheduled period. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, based in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **8 February at 12:00 (midday Brussels time)** for projects starting on 15 November of the same year or 15 January of the following year. |
| **How to apply?** | The application must be introduced in compliance with the modalities described in Part C of this Guide. |

Applicant organisations might also be assessed against **exclusion and selection criteria**. For more information please consult Part C of this Guide.

**AWARD CRITERIA**

The project will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project**<br><br>**(maximum 30 points)** | ▪ The proposed project and results foreseen will contribute efficiently to the objectives of the Capacity-building action in the target country/ies;<br>▪ The application clearly addresses the thematic national and regional priorities set by the programme for its target country/ies or region(s);<br>▪ The proposal is relevant and feasible in the local context of the partner country(/ies) targeted by the application. Advice on this aspect is provided via the EU Delegations in the countries concerned.<br>▪ The proposal explains why the planned activities and expected results meet the needs of the target groups in the best way;<br>▪ The project inscribes itself in the modernisation, development and internationalisation strategy of the targeted higher education institutions and is in line with the development strategies for higher education in the eligible Partner Countries;<br>▪ The objectives of the project are clear, realistic and appropriate, based on a genuine and adequate needs analysis;<br>▪ The project is innovative and /or complementary to other initiatives or projects already carried out under the present or past actions;<br>▪ The application demonstrates that similar results could not be achieved through national, regional or local funding. |
| **Quality of the project design and implementation**<br><br>**(maximum 30 points)** | ▪ The activities proposed over the lifetime of the project are of high quality, pertinent and appropriate to achieve the objectives and foreseen results;<br>▪ The proposed methodology is innovative, feasible and appropriate to achieve the foreseen results;<br>▪ The project is cost-effective and allocates appropriate resources to each activity;<br>▪ The overall project design ensures consistency between project objectives, methodology, activities and budget proposed; |

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| | ▪ The work plan is clear and realistic, with well-defined activities, realistic time-lines, clear deliverables and milestones. It demonstrates a logical and sound planning capacity and includes appropriate phases for preparation, implementation, evaluation, follow-up and dissemination of results;<br>▪ Challenges/risks of the project are clearly identified and mitigating actions properly addressed. Quality control measures, including indicators and benchmarks, are in place to ensure that the project implementation is of high quality, completed in time and on budget. Reliable sources are given for verification of indicators to measure the outcomes of the action. |
| **Quality of the project team and the cooperation arrangements**<br><br>**(maximum 20 points)** | ▪ The project involves a strong and complementary partnership of higher education institutions;<br>▪ The project team has the necessary skills, experience, expertise and management support to successfully deliver all aspects of the project;<br>▪ Where relevant, the project also includes the most appropriate and diverse range of non-academic partners, in order to benefit from their different experiences, profiles and specific expertise;<br>▪ The distribution of responsibilities and tasks is clear, appropriate, and demonstrates the commitment and active contribution of all participating organisations in relation to their specific expertise and capacity;<br>▪ An effective mechanism is proposed to ensure good coordination, decision making and communication between the participating organisations, participants and any other relevant stakeholder;<br>▪ The participating organisations from eligible Partner Countries are satisfactorily involved in the implementation of the action and decision making (including measures for any conflict resolution);<br>▪ The project involves higher education institutions that have not benefited from support for capacity building in the past. |
| **Impact and sustainability**<br><br>**(maximum 20 points)** | ▪ The project will have a substantial impact on the capacities of participating organisations (notably higher education institutions) in the eligible Partner Countries, in particular on the development and modernisation of higher education, to assist them in opening themselves up to society at large, the labour market and the wider world and to support their capacity for international cooperation;<br>▪ The project will produce multiplier effects outside the participating organisations at local/regional/national or international level. Measures are in place to assess the effective impact achieved by the project;<br>▪ The dissemination plan during and beyond the project lifetime is clear and efficient, with appropriate resources identified in each of the participating organisations, to ensure high quality dissemination of project experiences and outputs to relevant stakeholders;<br>▪ The project will ensure a real sustainability of the proposed activities and outputs after the project lifetime, in particular through attracting co-funding or other forms of support. It will also ensure the mainstreaming and effective use/implementation of the project results. |

During the assessment stage, applications may score up to 100 points. To be considered for funding, proposals must score at least 60 points in total and - out of these points - at least 15 points for the category "relevance of the project".

The acceptance of an application does not constitute an undertaking to award funding equal of the amount requested by the applicant. The funding requested may be reduced on the basis of the financial rules applicable to the action and the results of the evaluation.

A maximum of three project proposals per applicant organisation will be recommended for funding.

**PRIORITIES**

Depending on the countries involved in the project, national, regional or cross cutting priorities may be defined for both categories of projects (Joint Projects and Structural Projects). Should this be the case, projects will have to demonstrate how and to which extent they address these priorities.

Proposals not respecting the national and/or regional priorities will not be considered for funding. Cross-cutting priorities will be considered at selection stage for deciding between proposals of similar quality.

Three categories of national/regional priorities are proposed, covering the following areas:

- Improving quality of education and training in different subject areas (for curriculum development);;
- Improving management and operation of higher education institutions;
- Developing the higher education sector within society at large.

National projects, in the countries where national priorities have been established, will have to comply with national priorities. For the other countries, projects will have to comply with the regional priorities.

Multi-country projects, that is, projects involving institutions from at least two eligible Partner Countries, must respect the regional priorities or national priorities (if relevant) of the participating eligible Partner Countries involved. That is, the theme of the project must be listed as regional priority for each of the participating Partner Countries or the theme of the project must be listed as a national priority for each of the participating Partner Countries concerned. Preference will be given to projects focussing on subject areas insufficiently covered by past or existing projects and which include Partner Country higher education institutions not having benefited from or had a limited participation in the programme and/or former generation of programmes.

The detailed list of priorities applying to Capacity-building projects will be published on the websites of the Executive Agency.

## WHAT ELSE SHOULD YOU KNOW ABOUT A CAPACITY-BUILDING PROJECT?

The Capacity Building in higher education action is carried out within the context of the priorities of the European Union's Agenda for Change. The European Union shall take into account the need for geographical balance and diversity, the increased differentiation between developing countries when considering the final list of projects to be funded.
Funding for this action is on the basis of regional financial envelopes. After having considered the quality of projects in relation to the award criteria, their relevance to the local needs and the budget available for the given region, the need to achieve a sufficient geographical representation and diversity in terms of the numbers of projects for a given country may be taken into account.

### REGIONAL COOPERATION

Regional (countries within a same region) and cross-regional cooperation (cooperation between different regions of the world) should be relevant and justified by a detailed analysis of common needs and objectives. The choice of the countries must be adequate and coherent with the objectives proposed, in particular in cases where countries from different regions are concerned. Cross-regional cooperation is possible in multi-country projects provided that the theme of the proposal is listed as a regional priority or national priority (if relevant) for all the eligible Partner Countries concerned.

### IMPACT AND DISSEMINATION

Capacity-building projects are expected to have a long-term structural impact on the systems, organisations/institutions and individuals in the eligible Partner Countries. Projects will have to demonstrate their innovative character, the impact and sustainability of their results and how they intend to maintain or develop the outcomes after the end of the project. Where applicable, projects should demonstrate that they build upon the results of previous EU-funded projects, such as those under the former Alfa, Edulink, Erasmus Mundus and Tempus programmes. Every proposal has to demonstrate how the project results would be disseminated in the relevant target groups. Proposals for Structural Projects which mainly aim to impact at institutional level without demonstrating that the project will have a nation-wide impact, will not be selected.

## WHAT ARE THE FUNDING RULES FOR (JOINT AND STRUCTURAL) CAPACITY-BUILDING PROJECTS?

The financial support to Erasmus+ Capacity-building projects is based on an estimated budget combining contribution to unit costs and real costs.

Capacity-building projects in the field of higher education incur a large variety of costs, including staff costs, travel costs and costs of stay, equipment costs, sub-contracting costs, costs for dissemination of information, publishing, translation, overheads costs, etc.

The word "grant" refers to the amount of financing that may be requested from the programme, representing the European Union financial contribution to the project, and should not be mistaken with the total costs of a project which also includes co-funding from the partner institutions and external stakeholders.

The EU grant to the projects has to be considered as a contribution to cover part of the actual costs incurred by the partner institutions in carrying out the activities foreseen in the application/project. Participation in a Capacity-building project necessarily requires co-funding from the beneficiary institutions. Co-funding has therefore to be estimated by the project partners at the beginning, when the application is being prepared.

The principle of co-funding has been taken into account in the definition of the funding approach and in particular in defining the level of the contribution to unit costs used to calculate the budget/grant of the project. As a result, the applicants and beneficiaries will need to indicate the details of the co-funding made available for information and transparency purposes. Proof of expenditure or supporting documents will not be required.

Although the implementation of the project may require other types of expenditure (such as costs for dissemination, publishing, translation if these are not sub-contracted, overhead costs), this expenditure will not be taken into account to calculate the grant proposed. As a result, they will have to be covered by co-funding.

Financial reporting for budget items based on contribution to unit costs (contribution to staff costs, travel costs and costs of stay) will be based on the principle of the "triggering event". Beneficiaries will have to prove that the activities have actually been and properly implemented and the output produced, but will not have to report on the use of the funds. As a consequence, beneficiaries will have flexibility in the way they manage the funds awarded to cover the expenses necessary for the implementation of the project, once the requirements, in terms of activities and achievements are attained.

Financial reporting for budget items based on real costs (equipment and sub-contracting) will be based on the expenses actually incurred which will need to be duly documented (see below).

The grant proposed will never exceed the grant amount requested and will depend on:

- the grant amount requested by the applicant, the eligibility of the activities and the cost-efficiency of the project;
- the total budget available for Capacity-building projects.

The detailed financial implementation modalities of the project must be agreed upon by the partners and formalised in a partnership agreement to be signed at the beginning of the project.

## WHAT ELSE SHOULD YOU KNOW ABOUT THIS ACTION?

### EXCEPTIONAL COSTS

If the standard unit cost contribution is not sufficient to support the travel costs; applicants will be allowed to claim financial support under the budget heading "exceptional costs" (up to a maximum of 80% of total eligible costs: see "What are the funding rules?"). This would be allowed provided that applicants can justify that the standard funding rules (based on contribution to unit costs per travel distance band) do not cover at least 65% of the travel costs of participants.

The budget of the project must be drafted according to the following funding rules (in euro):

**Minimum EU grant for Joint and Structural projects: 500 000 EUR**
**Maximum EU grant for Joint and Structural projects: 1 000 000 EUR**

| Eligible costs | | Financing mechanism | Amount/ Maximum ceiling | | Rule of allocation |
|---|---|---|---|---|---|
| **Staff costs** | Contribution to the costs of staff performing tasks which are directly necessary to the achievements of the project's objectives | Contribution to unit costs | B4.1 per manager involved per day of work on the project | **Max. 40% of the total grant** | Conditional: applicants will have to justify the type and volume of resources needed in relation to the implementation of the proposed activities and outputs. The contribution is provided on condition that the salary for the same tasks is compensated only once. |
| | | | B4.2 per researcher/ teacher/trainer involved per day of work on the project | | |
| | | | B4.3 per technician involved per day of work on the project | | |
| | | | B4.4 per administrative staff involved per day of work on the project | | |
| **Travel costs** | Contribution to the travel costs of students and staff involved in the project, from their place of origin to the venue of the activity and return (including visa fee and related obligatory insurance, travel insurance and cancellation costs if justified). Activities and related travels must be carried out in the countries involved in the project. Any exception to this rule must be authorised by the Agency. For the detailed list of eligible activities, see Annex I of this Guide. | Contribution to unit costs | For travel distances between 10 and 99KM: 20 EUR per participant | | Based on the travel distance per participant. Travel distances must be calculated using the **distance calculator** supported by the European Commission[194]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[195]. Financial support will be provided only for travels that are directly related to the achievement of the objectives of the project. |
| | | | For travel distances between 100 and 499 KM: 180 EUR per participant | | |
| | | | For travel distances between 500 and 1999 KM: 275 EUR per participant | | |
| | | | For travel distances between 2000 and 2999 KM: 360 EUR per participant | | |
| | | | For travel distances between 3000 and 3999 KM: 530 EUR per participant | | |
| | | | For travel distances between 4000 and 7999 KM: 820 EUR per participant | | |
| | | | For travel distances of 8000 KM or more: 1500 EUR per participant | | |

[194] Distance calculator: http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[195] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

| | | | | | |
|---|---|---|---|---|---|
| **Costs of stay** | Costs for subsistence, accommodation, local and public transport such as bus and taxi, personal or optional health insurance. | Contribution to unit costs | Staff | up to the 14th day of activity:120 EUR per day per participant<br>+<br>between the 15 th and 60 th day of activity: 70 EUR per day per participant<br>+<br>between the 61th day of activity and up to 3 months: 50 EUR per day per participant | Based on the duration of the stay (including travel) of the participants. |
| | | | Students | up to the 14th day of activity:55 EUR per day per participant<br>+<br>between the 15 th and 90 th day of activity: 40 EUR per day per participant | |
| **Equipment** | Contribution for the purchase of equipment necessary for the implementation of the project. Support is provided only for equipment purchased for the benefit of the HEIs in the Partner Countries | Real costs | 100% of eligible costs<br>Max. 30% of the total grant | | Conditional: the request for financial support to cover these costs must be motivated in the application form |
| **Sub-contracting** | Support for sub-contracting costs that are necessary to the implementation of the project, including, in particular, costs for the compulsory financial audits (audit certificate) and for any external quality assurance procedure.<br><br>Sub-contracting for project-management-related tasks is not eligible. | Real costs | 100% of eligible costs<br>Max. 10% of the total grant | | Sub-contracting to external bodies should be very occasional. The specific competences and particular expertise needed to reach the project objectives should be found in the consortium and should determine its composition. |
| **Exceptional costs** | Expensive travel costs of participants (for details, see section "what else you should know about this action"). | Real costs | Expensive travel costs: maximum up to 80% of eligible costs | | |

**TABLE A – STAFF COSTS (AMOUNTS IN EURO PER DAY) PROGRAMME COUNTRIES**

The category of staff to be applied will depend on the work to be performed in the project and not on the basis of the status or title of the individual. In other words, staff costs related, for example, to an administrative task that has been carried out by an academic should be charged under the category "Administrative staff". Actual remuneration modalities of staff involved in the project will be defined jointly by the organisations involved in the project, endorsed by the managers responsible for their employment and will be part of the partnership agreement to be signed among the partners at the beginning of the project.
The unit-cost which will be applicable to calculate the grant will be the one of the country in which the staff member is engaged, independently of where the tasks will be carried out (i.e. a staff member of an organisation of Country A working (partly) in Country B will be considered for the unit-costs under Country A).

| | **Manager** | **Teacher/Trainer/Researcher/ Youth worker** | **Technician** | **Administrative staff**[196] |
|---|---|---|---|---|
| | **B4.1** | **B4.2** | **B4.3** | **B4.4** |
| Denmark, Ireland, Luxembourg, Netherlands, Austria, Sweden, Liechtenstein Norway | 294 | 241 | 190 | 157 |
| Belgium, Germany, France, Italy, Finland, United Kingdom, Iceland | 280 | 214 | 162 | 131 |
| Czech Republic, Greece, Spain, Cyprus, Malta, Portugal, Slovenia | 164 | 137 | 102 | 78 |
| Bulgaria, Estonia, Croatia, Latvia, Lithuania, Hungary, Poland, Romania, Slovakia, former Yugoslav Republic of Macedonia, Turkey | 88 | 74 | 55 | 39 |

[196] Students can work for the project and their salaries can be paid from Staff Costs (administrative staff) provided that they have signed a work contract with a consortium member institution.

**TABLE B – STAFF COSTS (AMOUNTS IN EURO PER DAY) PARTNER COUNTRIES**

The category of staff to be applied will depend on the work to be performed in the project and not on the basis of the status or title of the individual. In other words, staff costs related, for example, to an administrative task that has been carried out by an academic should be charged under the category "Administrative staff". Actual remuneration modalities of staff involved in the project will be defined jointly by the organisations involved in the project, endorsed by the managers responsible for their employment and will be part of the partnership agreement to be signed among the partners at the beginning of the project.
The unit-cost which will be applicable to calculate the grant will be the one of the country in which the staff member is engaged, independently of where the tasks will be carried out (i.e. a staff member of an organisation of Country A working (partly) in Country B will be considered for the unit-costs under Country A).

| | Manager | Teacher/Trainer/ Researcher | Technician | Administrative staff[197] |
|---|---|---|---|---|
| | B4.1 | B4.2 | B4.3 | B4.4 |
| Israel | 166 | 132 | 102 | 92 |
| Albania, Angola, Antigua and Barbuda, Argentina, Barbados, Bosnia and Herzegovina, Brazil, Chile, Colombia, Comoros, Cook Islands, Dominica, Gabon, Grenada, Republic of Côte d'Ivoire, Kosovo[198], Lebanon, Libya, Mexico, Montenegro, Nigeria, Peru, Saint Kitts And Nevis, Saint Lucia, Saint Vincent And the Grenadines, Sao Tome and Principe, Serbia, Seychelles, Thailand, Territory of Ukraine as recognised by international law, Uruguay, Venezuela, Zambia, Zimbabwe | 108 | 80 | 57 | 45 |
| Afghanistan, Azerbaijan, Bahamas, Bolivia, Burkina Faso, Cameroon, China, Congo, Costa Rica, Djibouti, Dominican Republic, Ecuador, El Salvador, Georgia, Guatemala, Guinea-Bissau, Haiti, Iran, Iraq, Jamaica, Jordan, Kazakhstan, Kenya, Micronesia, Morocco, Mozambique, Namibia, Palestine[199], Panama, Papua New Guinea, Paraguay, Senegal, South Africa, Surinam, Swaziland, Territory of Russia as recognised by international law, Trinidad and Tobago, Vanuatu | 77 | 57 | 40 | 32 |
| Algeria, Armenia, Bangladesh, Belarus, Belize, Benin, Bhutan, Botswana, Myanmar, Burundi, Cambodia, Cape Verde, Central African Republic, Chad, Congo – Democratic Republic of the-, Cuba, Korea (DPR), Egypt, Eritrea, Ethiopia, Equatorial Guinea, Fiji Island, Gambia, Ghana, Guinea, Guyana, Honduras, India, Indonesia, Kiribati, Kyrgyzstan, Laos, Lesotho, Liberia, Madagascar, Malawi, Malaysia, Maldives, Mali, Marshall Islands, Mauritania, Mauritius, Moldova, Mongolia, Nauru, Nepal, Nicaragua, Niger, Niue, Pakistan, Palau, Philippines, Rwanda, Samoa, Sierra Leone, Solomon, Somalia, South Sudan, Sri Lanka, Sudan, Syria, Tajikistan, Tanzania, Timor-Leste – Democratic Republic of, Togo, Tonga, Tunisia, Turkmenistan, Tuvalu, Uganda, Uzbekistan, Vietnam, Yemen | 47 | 33 | 22 | 17 |

[197] Students can work for the project and their salaries can be paid from Staff Costs (administrative staff) provided that they have signed a work contract with a consortium member institution.
[198] This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo Declaration of Independence.
[199] This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue

# CAPACITY BUILDING IN THE FIELD OF YOUTH

## WHAT ARE THE AIMS OF A CAPACITY-BUILDING PROJECT?

Youth Capacity-building projects aim to:

- foster cooperation and exchanges in the field of youth between Programme Countries and Partner Countries from different regions[200] of the world;
- improve the quality and recognition of youth work, non-formal learning and volunteering in Partner Countries and enhance their synergies and complementarities with other education systems, the labour market and society;
- foster the development, testing and launching of schemes and programmes of non-formal learning mobility at regional level (i.e. within and across regions of the world);
- promote transnational non-formal learning mobility between Programme and Partner Countries, especially targeting young people with fewer opportunities, with a view to improving participants' level of competences and fostering their active participation in society.

## WHAT IS A CAPACITY-BUILDING PROJECT?

Capacity-building projects are transnational cooperation projects based on multilateral partnerships between organisations active in the field of youth in Programme and Partner Countries. They can also involve organisations from the fields of education and training, as well as from other socio-economic sectors.

## WHAT ARE THE ACTIVITIES SUPPORTED BY A CAPACITY-BUILDING PROJECT?

Capacity-building projects should carry out activities that:

- promote strategic cooperation between youth organisations on the one hand and public authorities in Partner Countries on the other hand;
- promote the cooperation between youth organisations and organisations in the education and training fields as well as with representatives of business and labour market;
- raise the capacities of youth councils, youth platforms and local, regional and national authorities dealing with youth in Partner Countries;
- enhance the management, governance, innovation capacity and internationalisation of youth organisations in Partner Countries;
- launch, test and implement youth work practices, such as:
- tools and methods for the socio-professional development of youth workers and trainers;
- non-formal learning methods, especially those promoting the acquisition/improvement of competences, including media literacy skills;
- new forms of practical training schemes and simulation of real life cases in society; new forms of youth work, notably strategic use of open and flexible learning, virtual mobility, open educational resources (OER) and better exploitation of the ICT potential;
- cooperation, networking and peer-learning activities fostering efficient management, internationalisation and leadership of youth work organisations.

The following activities can be implemented within a Capacity-building project:

[200] In the framework of this Action, a region is defined as a grouping of countries belonging to a certain macro-geographic area.

**Capacity-building activities**

- activities encouraging policy dialogue, cooperation, networking and exchanges of practices in the field of youth, such as conferences, workshops and meetings;
- large-scale youth events;
- information and awareness campaigns;
- development of information, communication and media tools;
- development of youth work methods, tools and materials, as well as youth work curricula, training modules and documentation instruments such as Youthpass;
- creation of new forms of delivering youth work and providing training and support, notably through open and flexible learning materials, virtual cooperation and open educational resources (OER).

**Mobility activities**

- Youth Exchanges[201] between Programme and eligible Partner Countries;
- Volunteering activities[202] from/to eligible Partner Countries;
- Mobility of youth workers[203] between Programme and eligible Partner Countries.

Based on the geographical coverage, we distinguish four types of Capacity-building projects:

- Capacity-building projects between organisations active in the field of youth in Programme Countries and in the **Other Partner Countries** (from Regions 5-13, see section "Eligible Countries" in Part A of this Guide)

  These projects, submitted by organisations from Programme Countries, aim at increasing the capacity of organisations through the implementation of capacity-building activities and may include mobility activities.

- Capacity-building projects between organisations active in the field of youth in Programme Countries and in the Partner Countries from the Western Balkans (Region 1 - see section "Eligible Countries" in Part A of this Guide) - **Western Balkans Youth Window projects**

  These projects, submitted by organisations based in the Western Balkans (Region 1), aim at increasing the capacity of youth organisations through the implementation of capacity-building activities and may include mobility activities.

- Capacity-building projects between organisations active in the field of youth in Programme Countries and in the Eastern Partnership Partner Countries (Region 2 - see section "Eligible Countries" in Part A of this Guide) - **Eastern Partnership Youth Window projects[204]**

  These projects, submitted by organisations based in Eastern Partnership countries (Region 2), aim at increasing the capacity of youth organisations through one of the following two project types:

  – Civil Society Fellowships for Youth:

  Inclusive and participatory projects will strengthen the capacity of youth organisations and youth workers to build constructive relations with a variety of partners, including public bodies and civil society organisations. Selected young leaders – the "Fellows" – coming from the applicant organisations, will enhance their skills and competences in the field of policy development, through mobility activities and working in hosting organisations in the Programme Countries. Activities have to involve transnational non-formal learning mobility activities, like, for example, mentorship schemes and job shadowing. As part of the project implementation, young leaders will also carry out small youth policy engagement projects upon return to their sending organisation.

  – Partnership for Entrepreneurship:

201 For a detailed description of this activity, see the section "Key Action 1: mobility project for young people and youth workers" in Part B of this Guide.
202 As above.
203 As above.
204 Funded through the EU4youth Programme

Projects will promote youth entrepreneurship[205] education and social entrepreneurship among young people through transnational non-formal learning projects based on multilateral partnerships between organisations working in the mentioned areas, including business. Priority will be given to projects which offer practical solutions to social challenges present in the communities of origin and exploit the economic potential of the region also by involving the private sector. This type of project may also include mobility activities.

The European Commission envisages allocating about 60% of the available funds to "Civil Society Fellowships for Youth" and 40% to "Partnership for Entrepreneurship".

- Capacity-building projects between organisations active in the field of youth in Programme Countries and Tunisia.[206]

These projects, submitted by organisations based in Tunisia, aim at increasing the capacity of organisations through the implementation of capacity-building activities and may include mobility activities.

The projects under the three Windows - Western Balkans, Eastern Partnership countries, Tunisia- mentioned above are submitted by organisations based in one of the respective Partner Countries Neighbouring the EU under the specific Window and may include partner organisations from other countries from the same region. The term 'Window' refers to the fact that additional EU funds are allocated to the Erasmus+ Programme to increase the opportunities for youth cooperation with Partner Countries Neighbouring the EU.[207]

### WHAT IS THE ROLE OF THE ORGANISATIONS INVOLVED IN A CAPACITY-BUILDING PROJECT?

A Capacity-building project is composed of:

- Applicant/coordinator: organisation that submits the project proposal on behalf of all the partners. If the project is granted, the applicant/coordinator: 1) bears the financial and legal responsibility for the entire project towards the Executive Agency; 2) coordinates the project in cooperation with all other partners involved in the project; 3) receives the EU financial support from the Erasmus+ Programme and is responsible for distributing the funds among partners involved in the project.
- Partners: organisations that contribute actively to the preparation, implementation and evaluation of the Capacity-building project.
- Affiliated entities (optional): Organisations which contribute to the achievement of project objectives and activities. Affiliated entities must be identified in the grant application and satisfy the requirements as described in Annex III (Glossary of terms) of this Programme Guide.

If the project foresees the implementation of Youth Exchanges, Volunteering activities and/or mobility of youth workers, the participating organisations involved in these activities assume the following roles and tasks:

- Sending organisation: in charge of sending young people abroad (this includes: organising practical arrangements; preparing participants before departure; providing support to participants during all the phases of the project).
- Receiving organisation: in charge of hosting the activity, developing a programme of activities for participants in cooperation with participants and partner organisations, providing support to participants during all the phases of the project.

Furthermore, the participation in a volunteering activity must be free of charge for volunteers, with the exception of a possible contribution for travel costs (if the Erasmus+ grant does not fully cover these costs) and superfluous expenses not linked to the implementation of the activity. The essential costs for volunteers' participation in the activity are covered by the Erasmus+ grant or through other means afforded by the participating organisations.

### WHAT ARE THE CRITERIA USED TO ASSESS A CAPACITY-BUILDING PROJECT?

Here below are listed the formal criteria that a Capacity-building proposal must respect in order to be eligible for an Erasmus+ grant:

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[205] Entrepreneurship does not only entail the business dimension, but is also understood as a way of developing skills such as risk-taking and problem solving that facilitate achievement of life goals and in education.

[206] This Action is subject to approval by the European Neighbourhood Instrument (ENI) Committee.

[207] Mobility activities implemented in cooperation with Partner Countries Neighbouring the EU countries but having been submitted by a partner organisation in a Programme Country can be supported through Key Action 1: Mobility project for young people and youth workers and under Key Action 3 Meetings between young people and decision makers in the field of youth.

**ELIGIBILITY CRITERIA**

| | |
|---|---|
| **Eligible participating organisations** | A participating organisation can be any public or private organisation, with its affiliated entities (if any), established in a Programme Country or in a Partner Country from regions 1, 2, 5 to 13 and Tunisia, as defined by section "Eligible Countries" of the E+ Programme Guide.<br>For example, such organisation can be:<br>▪ a non-profit organisation, association, NGO (including European Youth NGOs);<br>▪ a national Youth Council;<br>▪ a public body at local, regional or national level;<br>▪ a school/institute/educational centre (at any level, from pre-school to upper secondary education, and including vocational education and adult education);<br>▪ a public or private, a small, medium or large enterprise (including social enterprises);<br>▪ a social partner or other representative of working life, including chambers of commerce, craft/professional associations and trade unions;<br>▪ a higher education institution;<br>▪ a research institute;<br>▪ a foundation;<br>▪ an inter-company training centre;<br>▪ a cultural organisation, library, museum;<br>▪ a body providing professional counselling and information services.<br>Organisations from eligible Partner Countries can only take part in the project as partners (not as applicants). |
| **Who can apply?** | Any:<br>▪ non-profit organisation, association, NGO (including European Youth NGOs);<br>▪ national Youth Council;<br>▪ public body at local, regional or national level.<br>**For projects between Programme Countries and Other Partner Countries from Regions 5 to 13**: The applicant must be established in a Programme Country and applies on behalf of all organisations involved in the project. Other types of organisations can be involved as partners, not as applicants.<br>**For Western Balkans Youth Window projects**: The applicant must be established in the Western Balkans.<br>**For Eastern Partnership Youth Window projects**: The applicant must be established in an Eastern Partnership country. In addition to the types of eligible applicant organisations mentioned here above, private companies, including social enterprises are eligible applicants.<br>**For Tunisia Youth Window projects**: The applicant must be established in Tunisia.<br>Applicants must – at the specified deadline for submitting their proposals – have been legally registered for at least one year. |
| **Number and profile of participating organisations** | Capacity-building projects are transnational and involve minimum 3 participating organisations from 3 different countries, of which at least one is a Programme Country and one is an eligible Partner Country.<br>Projects funded under one of the Windows may not involve participating organisations/participants from other Neighbouring regions. |
| **Duration of project** | From 9 months to 2 years. The duration has to be chosen at application stage, based on the objective of the project and on the type of activities foreseen over time. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by the following dates:<br>▪ **8 March at 12:00 (midday Brussels time)** for projects starting between 1 July and 31 December of the same year |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

| | |
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| **Other criteria** | Only one project proposal per deadline may be submitted by the same applicant.<br>A timetable for each activity planned in the project must be annexed to the application form. |

**ADDITIONAL ELIGIBILITY CRITERIA FOR YOUTH EXCHANGES**

| | |
|---|---|
| **Duration of activity** | From 5 to 21 days, excluding travel time. |
| **Venue(s) of the activity** | The activity must take place in the country of one of the organisations participating in the activity. . |
| **Eligible participants** | Young people aged between 13 and 30[208] resident in the countries of the sending and receiving organisations. |
| **Number of participants** | Minimum 16 and maximum of 60 participants (group leader(s) not included).<br>Minimum 4 participants per group (group leader(s) not included).<br>Each national group must have at least one group leader. A group leader is an adult who accompanies the young people participating in a Youth Exchange in order to ensure their effective learning, protection and safety. |

**ADDITIONAL ELIGIBILITY CRITERIA FOR VOLUNTEERING ACTIVITIES**

| | |
|---|---|
| **Accreditation** | All participating organisations established in a Programme Country or in one of the Partner Countries Neighbouring the EU must hold a valid accreditation at the relevant application deadline (for more information, please consult the relevant section of the Annex I of this Guide). |
| **Duration of the activity** | From 60 days to 12 months. |
| **Venue(s) of the activity** | **A volunteer from a Programme Country** must carry out her/his activity in one of the Partner Countries concerned by the project.<br>**A volunteer from an eligible Partner Country** must carry out her/his activity in one of the Programme Countries concerned by the project. |
| **Eligible participants** | Young people aged between 17 and 30[209], resident in the country of their sending organisation.<br>A volunteer can take part in only one Erasmus+ volunteering activity.<br>**Exception:** Volunteers who carried out a volunteering activity lasting maximum 2 months can take part in an additional volunteering activity. |
| **Number of participants** | Maximum 30 volunteers for the whole Capacity-building project. |

**ADDITIONAL ELIGIBILITY CRITERIA FOR MOBILITY OF YOUTH WORKERS**

| | |
|---|---|
| **Duration of activity** | From 5 days to 2 months, excluding travel time. |
| **Venue(s) of the activity** | The activity must take place in the country of one of the organisations participating in the activity. |
| **Eligible participants** | No age limits. Participants, with the exception of trainers and facilitators, must be resident in the country of their sending or receiving organisation. |
| **Number of participants** | Up to 50 participants (including, where relevant, trainers and facilitators) for each activity planned by the project. |

[208]Please also consider the following:
lower age limits - participants must have reached the minimum age at the start date of the activity;
upper age limits - participants must not be older than the indicated maximum age at the application deadline.
[209] See note above.

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

**AWARD CRITERIA**

The project will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 20 points)** | ▪ The relevance of the proposal to the objectives of the Action (see section "What are the aims of a Capacity-building project");<br>▪ The extent to which:<br>- the objectives are clearly defined, realistic and address issues relevant to the participating organisations and target groups;<br>- the proposal is innovative and/or complementary to other initiatives already carried out by the participating organisations;<br>- the capacity-building activities are clearly defined and aim at reinforcing the capacities of the participating organisations;<br>- the project involves young people with fewer opportunities.<br><br>As regards "Partnership for Entrepreneurship" projects:<br>▪ The extent to which projects offer:<br>- practical solutions to social challenges present in the communities of the origin and exploit the economic potential of the region also be involving the private sector.<br>- mobility activities of fellows from Eastern Partnership countries to Erasmus+ Programme countries relevant to these practical solutions |
| **Quality of the project design and implementation (maximum 30 points)** | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, monitoring, evaluation and dissemination;<br>▪ The consistency between project objectives and activities proposed;<br>▪ The quality of the non-formal learning methods proposed;<br>▪ The quality of arrangements for the recognition and validation of participants' learning outcomes as well as the consistent use of European transparency and recognition tools;<br>▪ The existence and relevance of quality control measures to ensure that the project implementation is of high quality, completed in time and on budget;<br>▪ The extent to which the project is cost-effective and allocates appropriate resources to each activity.<br>If the project foresees mobility activities:<br>▪ The appropriateness of measures for selecting and/or involving participants in the mobility activities. |
| **Quality of the project team and the cooperation arrangements (maximum 30 points)** | ▪ The extent to which:<br>- the project involves an appropriate mix of complementary participating organisations with the necessary profile, experience and expertise to successfully deliver all aspects of the project;<br>- the distribution of responsibilities and tasks demonstrates the commitment and active contribution of all participating organisations.<br>▪ The existence of effective mechanisms for coordination and communication between the participating organisations, as well as with other relevant stakeholders. |

| | |
|---|---|
| **Impact and dissemination (maximum 20 points)** | ▪ The quality of measures for evaluating the outcomes of the project;<br>▪ The potential impact of the project:<br>- on participants and participating organisations, during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at local, regional, national and/or international levels.<br>▪ The quality of the dissemination plan: the appropriateness and quality of measures aimed at sharing the outcomes of the project within and outside the participating organisations;<br>▪ If relevant, the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limitations;<br>▪ The quality of the plans for ensuring the sustainability of the project: its capacity to continue having an impact and producing results after the EU grant has been used up. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 10 points for the categories "relevance of the project" and "impact and dissemination"; 15 points for the categories "quality of the project design and implementation" and "quality of the project team and cooperation arrangements").

## WHAT ELSE SHOULD YOU KNOW ABOUT THIS ACTION?

EXCEPTIONAL COSTS

If the standard unit cost contribution is not sufficient to support the travel costs; applicants will be allowed to claim financial support under the budget heading "exceptional costs" (up to a maximum of **80%** of total eligible costs: see "What are the funding rules?"). This would be allowed provided that applicants can justify that the standard funding rules (based on contribution to unit costs per travel distance band) do not cover at least **70%** of the travel costs of participants.

## WHAT ARE THE FUNDING RULES?

The budget of the project must be drafted according to the following funding rules (in euro):

**Maximum grant awarded for a Capacity-building project: 150 000 EUR**

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Activity costs** | Costs directly linked to the implementation of the capacity-building activities of the project (excluding mobility activities) including:<br>▪ Information, Communication and Technology (ICT) costs<br>▪ Transnational project meetings between project partners for implementation and coordination purposes, conferences and large-scale youth events (excluding travel costs):<br>o board and lodging including local transport<br>o visa and insurance costs<br>o rental of rooms for meetings, conferences, other events<br>o interpretation costs<br>o costs for external speakers<br>▪ Intellectual outputs and dissemination of project results<br>o Production<br>o Translation<br>o Dissemination and/or information costs<br>▪ Linguistic, intercultural, task-related preparation of participants in mobility activities.<br>▪ Costs for the financial audit of the project<br>Indirect costs:<br>A flat-rate amount, not exceeding 7% of the eligible direct costs of the project, is eligible under indirect costs, representing the beneficiary's general administrative costs which can be regarded as chargeable to the project (e.g. electricity or internet bills, costs for premises, cost of permanent staff). | Real costs | Maximum 80% of the total eligible costs. | Conditional: the budget requested is justified in relation to the planned activities. Staff costs are not considered as eligible costs. |

| | | | | |
|---|---|---|---|---|
| **Travel costs** | Travel costs for Transnational project meetings between project partners for implementation and coordination purposes, conferences and large-scale youth events: | Contribution to unit costs | For travel distances between 10 and 99KM: 20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip |
| | | | For travel distances between 100 and 499 KM: 180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM: 275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM: 360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM: 530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM: 820 EUR per participant | |
| | | | For travel distances of 8000 KM or more: 1500 EUR per participant[210] | |

[210] Including trainers, facilitators and accompanying persons.

### A) Funding rules for Youth Exchanges carried out within the Capacity-building Project (optional funding)

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return. | Contribution to unit costs | For travel distances between 10 and 99KM:<br>20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[211]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[212] |
| | | | For travel distances between 100 and 499 KM:<br>180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM:<br>275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM:<br>360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM:<br>530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM:<br>820 EUR per participant | |
| | | | For travel distances of 8000 KM or more:<br>1500 EUR per participant | |
| **Organisational Support** | Costs directly linked to the implementation of mobility activities within the project (including costs for preparation activities, food, accommodation, local transport, premises, insurance, equipment and materials, evaluation, dissemination and exploitation of results and follow-up activities). | Contribution to unit costs | B4.1 per day of activity per participant[213] | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity). |

[211] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[212] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

[213] Including group leaders and accompanying persons.

| | | | | |
|---|---|---|---|---|
| **Special needs support** | Additional costs directly related to participants with disabilities and accompanying persons (including costs related to travel and subsistence, if justified and as long as a grant for these participants is not requested through budget categories "travel" and "organisational support"). | Real costs | 100% of eligible costs | Conditional: the request for financial support to cover special needs support must be motivated in the application form |
| **Exceptional costs** | Costs to support the participation of young people with fewer opportunities on equal terms as others (excluding travel costs and subsistence for participants).<br><br>Visa and visa-related costs, residence permits, vaccinations, medical certifications.<br><br>Expensive travel costs of participants (for details, see section "what else you should know about this action"). | Real costs | Expensive travel costs: maximum up to 80% of eligible costs<br><br>Other costs : 100% of eligible costs | Conditional: the request for financial support to cover exceptional costs must be motivated in the application form |

**B) FUNDING RULES FOR VOLUNTEERING ACTIVITIES CARRIED OUT WITHIN THE CAPACITY-BUILDING PROJECT (OPTIONAL FUNDING)**

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return | Contribution to unit costs | For travel distances between 10 and 99KM:<br>20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[214]. The applicant must indicate the distance of a one-way |
| | | | For travel distances between 100 and 499 KM:<br>180 EUR per participant | |

[214] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

| | | | | |
|---|---|---|---|---|
| | | | For travel distances between 500 and 1999 KM:<br>275 EUR per participant | travel to calculate the amount of the EU grant that will support the round trip[215] |
| | | | For travel distances between 2000 and 2999 KM:<br>360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM:<br>530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM:<br>820 EUR per participant | |
| | | | For travel distances of 8000 KM or more:<br>1500 EUR per participant | |
| **Organisational Support** | Costs directly linked to the implementation of mobility activities within the project (including costs for preparation activities, food, accommodation, local transport, premises, insurance, equipment and materials, evaluation, dissemination and exploitation of results and follow-up activities). | Contribution to unit costs | B4.3 per day per volunteer[216] | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity) |
| **Individuals support** | "Pocket money" to the volunteer for additional personal expenses. | Contribution to unit costs | B4.4 per day per volunteer | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity) |

[215] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return.

[216] Including accompanying persons for volunteers with fewer opportunities.

| | | | | |
|---|---|---|---|---|
| **Special needs support** | Costs for subsistence of accompanying persons and costs related to travel if justified and as long as a grant for these participants is not requested through budget category "travel".<br>Additional costs directly related to participants with disabilities (including costs related to travel and subsistence, if justified and as long a grant for these participants is not requested through budget categories "travel" and "organisational support"). | Real costs | 100% of eligible costs | Conditional: the request for financial support to cover special needs support must be motivated in the application form |
| **Exceptional costs** | Costs to support the participation of young people with fewer opportunities on equal terms as others, including for specific preparation and reinforced mentorship (excluding costs for travel and organisational support for participants and accompanying persons).<br>Visa and visa-related costs, residence permits, vaccinations, medical certifications.<br><br>Expensive travel costs of participants (for details, see section "what else you should know about this action"). | Real costs | Expensive travel costs: maximum up to 80% of eligible costs<br><br>Other costs : 100% of eligible costs | Conditional: the request for financial support to cover exceptional costs must be motivated in the application form |

**C) FUNDING RULES FOR MOBILITY OF YOUTH WORKERS CARRIED OUT WITHIN THE CAPACITY-BUILDING PROJECT (OPTIONAL FUNDING)**

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return | Contribution to unit costs | For travel distances between 10 and 99KM:<br>20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[217]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[218] |
| | | | For travel distances between 100 and 499 KM:<br>180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM:<br>275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM:<br>360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM:<br>530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM:<br>820 EUR per participant | |
| | | | For travel distances of 8000 KM or more:<br>1500 EUR per participant | |
| **Organisational Support** | Costs directly linked to the implementation of mobility activities within the project (including costs for preparation activities, food, accommodation, local transport, premises, insurance, equipment and materials, evaluation, dissemination and exploitation of results and follow-up activities). | Contribution to unit costs | B4.2 per participant[219] per day of activity. Maximum 1 100 EUR per participant. | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity). |

[217] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[218] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

[219] Including trainers, facilitators and accompanying persons.

| | | | | |
|---|---|---|---|---|
| **Special needs support** | Additional costs directly related to participants with disabilities and accompanying persons (including costs related to travel and subsistence, if justified and as long as a grant for these participants is not requested through budget categories "travel" and "organisational support"). | Real costs | 100% of eligible costs | Conditional: the request for financial support to cover special needs support must be motivated in the application form |
| **Exceptional costs** | Visa and visa-related costs, residence permits, vaccinations, medical certifications.<br><br>Expensive travel costs of participants from/to outermost regions and Overseas Countries and Territories (for details, see section "what else you should know about this action"). | Real costs | Expensive travel costs: maximum up to 80% of eligible costs<br><br>Other costs : 100% of eligible costs | Conditional: the request for financial support to cover exceptional costs must be motivated in the application form |

### D) ORGANISATIONAL AND INDIVIDUAL SUPPORT

The amounts depend on the country where the mobility activity takes place.

| | Organisational support | | | Individual support |
|---|---|---|---|---|
| | Youth Exchanges (euro per day) | Mobility of youth workers (euro per day) | Volunteering activities (euro per day) | |
| | B4.1 | B4.2 | B4.3 | B4.4 |
| **Belgium** | 42 | 65 | 26 | 4 |
| **Bulgaria** | 32 | 53 | 17 | 4 |
| **Czech Republic** | 32 | 54 | 17 | 5 |
| **Denmark** | 45 | 72 | 26 | 6 |
| **Germany** | 41 | 58 | 23 | 5 |
| **Estonia** | 33 | 56 | 18 | 4 |
| **Ireland** | 49 | 74 | 26 | 6 |
| **Greece** | 38 | 71 | 21 | 5 |
| **Spain** | 34 | 61 | 18 | 5 |
| **France** | 38 | 66 | 20 | 6 |
| **Croatia** | 35 | 62 | 19 | 5 |
| **Italy** | 39 | 66 | 21 | 5 |
| **Cyprus** | 32 | 58 | 21 | 5 |
| **Latvia** | 34 | 59 | 19 | 4 |
| **Lithuania** | 34 | 58 | 18 | 4 |
| **Luxembourg** | 45 | 66 | 26 | 5 |
| **Hungary** | 33 | 55 | 17 | 5 |
| **Malta** | 39 | 65 | 22 | 5 |
| **Netherlands** | 45 | 69 | 26 | 5 |
| **Austria** | 45 | 61 | 23 | 5 |
| **Poland** | 34 | 59 | 18 | 4 |
| **Portugal** | 37 | 65 | 20 | 5 |
| **Romania** | 32 | 54 | 17 | 3 |
| **Slovenia** | 34 | 60 | 20 | 4 |
| **Slovakia** | 35 | 60 | 19 | 5 |
| **Finland** | 45 | 71 | 26 | 5 |
| **Sweden** | 45 | 70 | 26 | 5 |
| **United Kingdom** | 45 | 76 | 26 | 6 |
| **former Yugoslav Republic of Macedonia** | 28 | 45 | 15 | 3 |
| **Iceland** | 45 | 71 | 26 | 6 |
| **Liechtenstein** | 45 | 74 | 24 | 6 |
| **Norway** | 50 | 74 | 26 | 6 |
| **Turkey** | 32 | 54 | 17 | 4 |
| **Partner Country** | 29 | 48 | 15 | 3 |

# KEY ACTION 3: SUPPORT FOR POLICY REFORM

The activities in support for policy reform are targeted at the achievement of the goals of the European policy agendas, in particular the Europe 2020 Strategy, of the Strategic framework for European cooperation in education and training (ET 2020) and of the European Youth Strategy.

## WHICH ACTIONS ARE SUPPORTED?

The following Action is implemented through this Programme Guide:

- Structured Dialogue: meetings between young people and decision-makers in the field of youth.

This Part B of the Guide provides detailed information on the criteria and funding rules applying to this Action.

In addition, Key Action 3 covers many other Actions in support of policy reform in the education, training and youth fields that are implemented directly by the European Commission or through specific calls for proposals managed by the Executive Agency. More information is available on the websites of the European Commission, the Executive Agency and National Agencies. A concise description of these Actions is provided below:

**Knowledge in the fields of education, training and youth,** involving evidence gathering, analysis and peer learning. In particular:

- thematic and country-specific expertise, studies on policy issues and reforms, including the activities carried out by the Eurydice network;
- support to the participation of Erasmus+ countries in European/international surveys aimed at monitoring specific trends and developments, including the evolution of language competences development in Europe;
- EU Presidency events, conferences and high-level meetings;
- exchanges of experience and good practice and peer reviews;
- support to the implementation of the Open Methods of Coordination.

**Initiatives for policy innovation** aimed to develop new policies or prepare their implementation. They include specific calls for proposals managed by the Executive Agency on: a) European policy experimentations, led by high-level public authorities and involving field trials on policy measures in several countries, based on sound evaluation methods ; b) forward-looking cooperation projects for innovative policy development.

Support to European policy tools, in particular:

- Transparency tools (skills and qualifications), to facilitate transparency and recognition of skills and qualifications, as well as the transfer of credits, foster quality assurance, support skills management and guidance. This Action will also include networks providing support for the implementation of those tools;
- Skills intelligence for the development and support of European tools such as the EU Skills Panorama –online platform;
- Networks supporting specific policy areas such as literacy and adult learning, as well as youth work and youth information (SALTO and Eurodesk);
- Dedicated higher education tools – development and support to tools such as U-Multirank, support to the Bologna Process or to the external dimension of higher education; the national teams of Higher Education Reform Experts in neighbourhood and enlargement, as well as Russia and Central Asia;
- Dedicated VET tools for the implementation of the VET Mobility Charter, to increase the quality level of organised mobility, and to support the National Authorities on apprenticeships in increasing the quality and supply of apprenticeships throughout Europe.

**Cooperation with international organisations,** such as the OECD and the Council of Europe. This Action will also foster policy dialogue with Partner Countries as well as the promotion of the international attractiveness of European higher education in the world. It will also support the network of Higher Education Reform Experts in Partner Countries neighbouring the EU and the international alumni associations.

Stakeholder dialogue, policy and Programme promotion, including:

- Civil Society Cooperation supporting European NGOs and EU-wide networks in the fields of education, training and youth though a specific call for proposals managed by the Executive Agency;
- public events, meetings, debates and consultations with policy makers and stakeholders on relevant policy issues (such as the Education, Training and Youth Forum or the European Youth Week);
- Structured Dialogue in the youth field, including the support to National Working Groups as well as meetings promoting dialogue between young people and decision-makers (see section below);

- awareness-raising, information and dissemination activities on policy outcomes and priorities, on the Erasmus+ Programme, its results and its potential synergies with other EU programmes, in particular the European Structural and Investment Funds.

The Actions implemented through this Key Action are aimed to:

- improve the quality, efficiency and equity of education and training systems and youth policies through the Open Methods of Coordination.
- support the implementation of the general and Country-Specific Recommendations resulting from the European Semesters;
- promote transnational cooperation and mutual learning between competent authorities at the highest political level in order to improve systems, structures and processes;
- develop knowledge and analytical capacity to support evidence-based policy under the Strategic framework for cooperation in education and training (ET2020), the European Youth Strategy and specific policy agendas such as the Bologna and Copenhagen processes;
- make available sound comparative international data and appropriate secondary analyses for European and national policy making, facilitating the collection and analysis of substantive evidence to assess and monitor the implementation of innovative policies and to encourage transferability and scalability;
- support European networks and implement tools fostering the transparency and recognition of skills and qualifications acquired through formal, non-formal and informal learning,
- support the active involvement of civil society networks and non-governmental organisations in policy implementation;
- support the Structured Dialogue with young people and encourage their active participation in democratic life
- support exchanges of good practices, dialogue, mutual learning and cooperation among policy makers, practitioners and stakeholders from Programme and Partner Countries;
- raise awareness of the results of European policies and of the Erasmus+ Programme and facilitate their exploitation at local, regional or national level. Raise the profile and attractiveness of European higher education worldwide;
- foster synergies with other EU programmes, such as the European Structural and Investment Funds, as well as with funding schemes at national or regional level.

# STRUCTURED DIALOGUE: MEETINGS BETWEEN YOUNG PEOPLE AND DECISION-MAKERS IN THE FIELD OF YOUTH

## WHAT IS THE AIM OF STRUCTURED DIALOGUE MEETINGS?

This Action promotes the active participation of young people in democratic life and fosters debate around topics centred on the themes and priorities set by the Structured Dialogue and the renewed political framework in the youth field. Structured Dialogue is the name used for discussions between young people and youth policy-makers in order to obtain results which are useful for policy-making. The debate is structured around priorities and timing and foresees events where young people discuss the agreed themes among themselves and with policy-makers, youth experts and representatives of public authorities in charge of youth. More information about Structured Dialogue is available on the European Commission's website.

## WHAT ARE STRUCTURED DIALOGUE MEETINGS?

Structured Dialogue projects can take the form of meetings, conferences, consultations and events. These events promote the active participation of young people in democratic life in Europe and their interaction with decision-makers. As a concrete result of these events, young people are able to make their voice heard (through the formulation of positions, proposals and recommendations) on how youth policies should be shaped and implemented in Europe.

A Structured Dialogue project has three phases:

- planning and preparation;
- implementation of the activities;
- evaluation (including reflection on a possible follow-up).

## WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Under this Action, a project can comprise one or more of the following activities:

- national meetings and transnational/international seminars that offer space for information, debate and active participation of young people – in dialogue with youth decision-makers - on issues which are relevant to Structured Dialogue or to the EU Youth Strategy;
- national meetings and transnational seminars that prepare the ground for the official Youth Conferences organised during each semester by the Member State holding the turn of Presidency of the European Union;
- events that promote debates and information on youth policy themes linked to the activities organised during the European Youth Week;
- consultations of young people, with a view to find out their needs on matters relating to participation in democratic life (online consultations, opinion polls, etc.);
- meetings and seminars, information events or debates between young people and decision-makers/youth experts around the theme of participation in democratic life;
- events simulating the functioning of the democratic institutions and the roles of decision-makers within these institutions.

The activities are led by young people; the young participants must be actively involved in all the stages of the project, from preparation to follow-up. Non-formal learning principles and practices are reflected throughout the implementation project.

The following activities are not eligible for grants under Structure Dialogue: statutory meetings of organisations or networks of organisations; politically influenced events.

## WHAT ARE THE CRITERIA USED TO ASSESS THIS PROJECT?

Here below are listed the formal criteria that the project must respect in order to be eligible for an Erasmus+ grant:

**ELIGIBILITY CRITERIA**

| | |
|---|---|
| **Eligible participating organisations** | A participating organisation can be:<br>▪ a non-profit organisation, association, NGO;<br>▪ a European Youth NGO;<br>▪ a public body at local or regional level;<br>established in a Programme Country or in a Partner Country neighbouring the EU (regions 1 to 4; see section "Eligible Countries" in Part A of this Guide). Organisations from eligible Partner Countries can only take part in the project as partners (not as applicants). |
| **Who can apply?** | Any participating organisation established in a Programme Country can be the applicant. In case of projects realised by two or more participating organisations, one of the organisations applies on behalf of all participating organisations involved in the project. |
| **Number of participating organisations** | Transnational/International meetings: the activity must involve at least two participating organisations from at least two different countries, of which at least one is a Programme Country.<br>National meetings: the activity involves at least one organisation from a Programme Country. |
| **Eligible participants** | Young participants: young people aged between 13 and 30 resident in the countries involved in the project.<br>Decision-makers: if the project foresees the participation of decision-makers or experts in the youth policy field, these participants can be involved regardless of their age and geographical provenance. |
| **Number of participants** | Minimum 30 young participants must be involved in the project. |
| **Venue(s)** | National meetings: the activity must take place in the country of the applicant organisation.<br>Transnational/international meetings: the activities may take place in any of the Programme Countries involved in the activity.<br>Exception: Only in duly justified cases and if the main activity includes elements of dialogue with decision-makers at European level, an activity can take place at the seat of an Institution of the European Union[220]. |
| **Duration of project** | From 3 to 24 months. |
| **Where to apply?** | To the National Agency of the country in which the applicant organisation is established. |
| **When to apply?** | Applicants have to submit their grant application by the following dates:<br>▪ **1 February at 12:00 (midday Brussels time)** for projects starting between 1 May and 30 September of the same year;<br>▪ **26 April at 12:00 (midday Brussels time)** for projects starting between 1 August and 31 December of the same year;<br>▪ **4 October at 12:00 (midday Brussels time)** for projects starting between 1 January and 31 May of the following year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |
| **Other criteria** | A timetable for each of the meetings planned in the project must be annexed to the application form.<br>A Declaration of Honour of the legal representative must be annexed to the application form. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

[220] Seats of the Institutions of the European Union are Brussels, Frankfurt, Luxembourg, Strasbourg and The Hague.

### AWARD CRITERIA

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives and priorities of the Action (Please see section "What are the aims of structured dialogue meetings?" above );<br>- the needs and objectives of the participating organisations and of the individual participants.<br>▪ The extent to which the proposal is suitable of:<br>- producing high-quality outcomes for participants;<br>- reinforcing the capacities of the participating organisations.<br>▪ The extent to which the project involves young people with fewer opportunities. |
| **Quality of the project design and implementation (maximum 40 points)** | ▪ The clarity, completeness and quality of all the phases of the project proposal (preparation, implementation of mobility activities, and follow-up);<br>▪ The consistency between project objectives and activities proposed;<br>▪ The quality of the practical arrangements, management and support modalities ;<br>▪ The quality of the non-formal learning participative methods proposed and the active involvement of young people during all the stages of the project;<br>▪ The appropriateness of measures for selecting and/or involving participants in the activities;<br>▪ The extent to which the project proposal involves relevant decision makers (policy-makers, youth experts, representatives of public authorities in charge of youth, etc.);<br>▪ If appropriate, the quality of cooperation and communication between the participating organisations, as well as with other relevant stakeholders . |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the project;<br>▪ The potential impact of the project:<br>- on participants and participating organisations during and after the project lifetime ;<br>- outside the organisations and individuals directly participating in the project at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the project within and outside the participating organisations;<br>▪ If relevant, the extent to which the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limitations. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 15 points for the categories "relevance of the project" and "impact and dissemination"; 20 points for the category "quality of the project design and implementation").

## WHAT ELSE YOU SHOULD KNOW ABOUT THIS ACTION?

### EXCEPTIONAL COSTS

Applicants of mobility projects will be allowed to claim financial support for travel costs the budget heading "exceptional costs" (up to a maximum of 80% of total eligible costs: see "What are the funding rules?"). This would be allowed provided that applicants can justify that the standard funding rules (based on contribution to unit costs per travel distance band) do not cover at least 70% of the travel costs of participants.

## WHAT ARE THE FUNDING RULES?

The budget of the project must be drafted according to the following funding rules (in euro):

**Maximum grant awarded per project for a Structured Dialogue meeting: 50 000 euro**

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Travel** | Contribution to the travel costs of participants, including accompanying persons, from their place of origin to the venue of the activity and return | Contribution to unit costs | For travel distances between 10 and 99KM: 20 EUR per participant | Based on the travel distance per participant. Travel distances must be calculated using the distance calculator supported by the European Commission[221]. The applicant must indicate the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[222] |
| | | | For travel distances between 100 and 499 KM: 180 EUR per participant | |
| | | | For travel distances between 500 and 1999 KM: 275 EUR per participant | |
| | | | For travel distances between 2000 and 2999 KM: 360 EUR per participant | |
| | | | For travel distances between 3000 and 3999 KM: 530 EUR per participant | |
| | | | For travel distances between 4000 and 7999 KM: 820 EUR per participant | |
| | | | For travel distances of 8000 KM or more: 1500 EUR per participant | |
| **Organisational support** | Grant contribution to all other costs directly linked to the preparation, implementation and follow-up of the activity | Contribution to unit costs | C1.1 per day of activity per participant[223] | Based on the duration of the stay per participant (if necessary, including also one travel day before the activity and one travel day following the activity). |

[221] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[222] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the participant from Madrid to Rome and return (275 EUR).

[223] Including accompanying persons.

| | | | | |
|---|---|---|---|---|
| **Special needs support** | Additional costs directly related to participants with disabilities and accompanying persons (including costs related to travel and subsistence, if justified and as long as a grant for these participants is not requested through budget categories "travel" and "organisational support"). | Real costs | 100% of eligible costs | Conditional: the request for financial support to cover special needs support and exceptional costs must be motivated in the application form |
| **Exceptional costs** | Costs connected to (online) consultations and opinion polls of young people in so far as necessary for the participation in this Action.<br>Costs connected to dissemination and exploitation of results.<br>Costs to support the participation of young people with fewer opportunities on equal terms as others (excluding costs for travel and organisational support).<br>Visa and visa-related costs, residence permits, vaccinations, medical certifications.<br>Costs for providing a financial guarantee, if the National Agency asks for it.<br>Expensive travel costs of participants from/to outermost regions and Overseas Countries and Territories (for details, see section "what else you should know about this action"). | Real costs | Costs connected to (online) consultations and opinion polls of young people, for financial guarantee and dissemination activities: 75% of eligible costs<br>Expensive travel costs: maximum up to 80% of eligible costs<br>Other costs: 100% of eligible costs | |

**TABLE A - ORGANISATIONAL SUPPORT (AMOUNTS IN EURO PER DAY)**

The amounts depend on the country where the activity takes place.

| | Organisational Support |
|---|---|
| | C1.1 |
| Belgium | 42 |
| Bulgaria | 32 |
| Czech Republic | 32 |
| Denmark | 45 |
| Germany | 41 |
| Estonia | 33 |
| Ireland | 49 |
| Greece | 38 |
| Spain | 34 |
| France | 38 |
| Croatia | 35 |
| Italy | 39 |
| Cyprus | 32 |
| Latvia | 34 |
| Lithuania | 34 |
| Luxembourg | 45 |
| Hungary | 33 |
| Malta | 39 |
| Netherlands | 45 |
| Austria | 45 |
| Poland | 34 |
| Portugal | 37 |
| Romania | 32 |
| Slovenia | 34 |
| Slovakia | 35 |
| Finland | 45 |
| Sweden | 45 |
| United Kingdom | 45 |
| former Yugoslav Republic of Macedonia | 28 |
| Iceland | 45 |
| Liechtenstein | 45 |
| Norway | 50 |
| Turkey | 32 |
| Partner Country neighbouring the EU | 29 |

# JEAN MONNET ACTIVITIES

## WHICH ACTIONS ARE SUPPORTED?

Jean Monnet Activities support the following Actions:

- Jean Monnet Modules (teaching and research);
- Jean Monnet Chairs (teaching and research);
- Jean Monnet Centres of Excellence (teaching and research);
- Jean Monnet Support to Associations;
- Jean Monnet Networks (policy debate with the academic world);
- Jean Monnet Projects (policy debate with the academic world).

The following sections of this Guide provide detailed information on the criteria and funding rules applying to the Jean Monnet Actions.

## WHAT ARE THE AIMS OF JEAN MONNET?

The Jean Monnet Actions aim at promoting excellence in teaching and research in the field of European Union studies worldwide. These Actions also aim at fostering the dialogue between the academic world and policy-makers, in particular with the aim of enhancing EU and global governance.
European Union studies comprise the study of Europe in its entirety with particular emphasis on the European integration process in both its internal and external aspects. They promote active European citizenship and deal with the role of the EU in a globalised world , enhancing awareness of the Union and facilitating future engagement and people-to-people dialogue worldwide.
The core subject areas are the following:

- EU and Comparative Regionalism Studies;
- EU Communication and Information Studies;
- EU Economic Studies;
- EU Historical Studies;
- EU Intercultural Dialogue Studies;
- EU Interdisciplinary Studies;
- EU International Relations and Diplomacy Studies;
- EU Legal Studies;
- EU Political and Administrative Studies.

However, different subject areas (such as sociology, philosophy, religion, geography, literature, art, sciences, environmental studies, global studies, etc.) may also be associated with this field of study when they include an element of teaching, research or reflection on the EU and contribute, in general, to the Europeanization of the curricula.
Comparative studies will only be considered where they relate to the different integration processes throughout the world.
In relation to the general objectives of the Erasmus+ Programme, Jean Monnet aims to:

- promote excellence in teaching and research in EU studies;
- equip students and young professionals with knowledge of European Union subjects relevant for their academic and professional lives and enhance their civic skills;
- foster the dialogue between the academic world and policy-makers, in particular to enhance governance of EU policies;
- promote innovation in teaching and research (e.g. cross-sectoral and/or multi-disciplinary studies, open education, networking with other institutions);
- mainstream and diversify EU-related subjects throughout the curricula proposed by higher education institutions to their students;
- improve the quality of professional training on EU subjects (with modules that deal with EU subjects more in-depth or extend to new subjects);
- foster the engagement of young academics in teaching and research on European subjects.

Jean Monnet is expected to bring positive and long-lasting effects to the participants involved, to the promoting organisations, as well as to the policy systems within which they are framed.

As regards the participants directly or indirectly involved in the Actions, Jean Monnet aims to produce the following outcomes:

- enhanced employability and improved career prospects for young graduates, by including or reinforcing a European dimension in their studies;
- increased interest in understanding and participating in the European Union, leading to a more active citizenship;
- support for young researchers (i.e. who have obtained a PhD degree in the last five years) and professors who want to carry out research and teaching on EU subjects;
- increased opportunities for academic staff in terms of professional and career development.

Activities supported under Jean Monnet are also expected to produce the following outcomes on participating organisations:

- increased capacity to teach and research on EU matters: improved or innovative curricula; increased capacity to attract excellent students; reinforced cooperation with partners from other countries; increased allocation of financial resources to teaching and research on EU subjects within the institution;
- more modern, dynamic, committed and professional environment inside the organisation: promoting the professional development of young researchers and professors; ready to integrate good practices and new EU subjects into didactic programmes and initiatives; open to synergies with other organisations.

Jean Monnet is expected in the long run to encourage the promotion and diversification of EU studies worldwide as well as to enhance and extend the participation of staff from more faculties and departments in European Union teaching and research.

# JEAN MONNET MODULES

## WHAT IS A JEAN MONNET MODULE?

A Jean Monnet Module is a short teaching programme (or course) in the field of European Union studies at a higher education institution. Each Module has a minimum duration of 40 teaching hours per academic year. Teaching hours are taken to include direct contact hours in the context of group lectures, seminars, tutorials and may include any of the aforementioned in a distance learning format but do not include individual instruction. Modules may concentrate on one particular discipline in European studies or be multidisciplinary in approach and therefore call upon the academic input of several professors and experts.

Erasmus+ supports Jean Monnet Modules with the aim to:

- promote research and first teaching experience for young researchers and scholars and practitioners in European Union issues;
- foster the publication and dissemination of the results of academic research;
- create interest in the EU and constitute the basis for future poles of European knowledge, particularly in Partner Countries;
- foster the introduction of a European Union angle into mainly non EU related studies;
- deliver tailor-made courses on specific EU issues relevant for graduates in their professional life.

The Jean Monnet Module anchors and mainstreams teaching on EU matters in curricula which so far have included EU-related content only to a limited extent. They also bring facts and knowledge on the European Union to a broad spectrum of learners and interested citizens.

## WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Jean Monnet Modules must take one of the following forms:

- general or introductory courses on European Union issues (in particular at institutions and faculties that do not yet have a highly developed course offering in the field);
- specialised teaching on European Union developments (in particular at institutions and faculties that do already have a highly developed course offering in the field);
- summer and intensive courses that are fully recognised.

## WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN A JEAN MONNET MODULE?

Higher education institutions have the role of supporting and promoting the Module coordinators by ensuring that the largest possible public benefits from their activities both inside and outside the institution.

Higher education institutions support Module coordinators in their teaching, research and reflection activities: they recognise the teaching activities developed; they monitor the activities, give visibility and valorise the results obtained by their staff involved in Jean Monnet.

Higher education institutions are required to maintain the activities of a Jean Monnet Module during the entire duration of the project, including replacing the academic coordinator if the need arises. If the institution is obliged to replace Module coordinators, a written request for approval has to be sent to the Executive Agency. Moreover, the new proposed coordinator must have the same level of specialisation in European Union studies.

## WHAT ARE THE CRITERIA USED TO ASSESS A JEAN MONNET MODULE?

Here below are listed the formal criteria that a Jean Monnet Module must respect in order to be eligible for an Erasmus+ grant:

### ELIGIBILITY CRITERIA

| | |
|---|---|
| **Who can apply?** | A higher education institution (HEI) established in any country of the world. HEIs established in Programme Countries must hold a valid Erasmus Charter for Higher Education (ECHE). An ECHE is not required for participating HEIs in Partner Countries.<br><br>Individuals cannot apply directly for a grant. |

| | |
|---|---|
| **Duration of project** | Three years. |
| **Duration of activity** | A Jean Monnet Module must be taught for a minimum of 40 hours per academic year (for three consecutive years) in the field of European Union studies at the applicant higher education institution. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **22 February at 12:00 (midday Brussels time)** for projects starting on 1 September of the same year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

Applicant organisations will also be assessed against **exclusion and selection criteria**. For more information please consult Part C of this Guide.

### AWARD CRITERIA

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project**<br>(Maximum 25 points) | ▪ The relevance of the proposal to:<br>- the objectives and priorities of the Action (see sections "What are the aims of Jean Monnet " and "What is a Jean Monnet Module").<br>▪ The extent to which the proposal:<br>- is suitable for fostering the development of new teaching, research or debating activities;<br>- includes the use of new methodologies, tools and technologies;<br>- demonstrates evidence of academic added value ;<br>- promotes and gives greater visibility to this European studies/issues both within the institution participating in the Jean Monnet Action and outside.<br>▪ The relevance of the proposal to priority target groups of the Action:<br>- institutions established in countries not covered by the Jean Monnet Action;<br>- institutions or academics not yet in receipt of Jean Monnet funding;<br>- specific EU related subjects in studies which have had limited exposure to but are increasingly affected by European aspects;<br>- students who do not automatically come into contact with European studies (in such fields as science, engineering, medicine, education, arts and languages, etc.). |
| **Quality of the project design and implementation**<br>(Maximum 25 points) | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, evaluation, follow-up and dissemination;<br>▪ The consistency between project objectives, activities and the budget proposed;<br>▪ The quality and feasibility of the methodology proposed. |
| **Quality of the project team**<br>(Maximum 25 points) | ▪ The pertinence of the profile and expertise of key academic staff involved - both in the academic and non-academic domains - with the activities carried out in the project. |

| | |
|---|---|
| **Impact and dissemination**<br>(Maximum 25 points) | ▪ The quality of measures for evaluating the outcomes of the teaching activities;<br>▪ The potential impact of the project:<br>- on the institution(s) participating in the Jean Monnet Action;<br>- on the students and learners benefiting from the Jean Monnet Action;<br>- on other organisations and individuals involved at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the activities within and outside the institution hosting the Jean Monnet Activities;<br>▪ If relevant, the extent to which the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain any disproportionate limitations. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least 13 points in each of the categories of award criteria mentioned above.

## WHAT ELSE SHOULD YOU KNOW ABOUT A JEAN MONNET MODULE?

### BUDGET ALLOCATION

Up to 20% of the budget allocated to support Modules will be granted to Jean Monnet Modules for which the coordinators are researchers who have obtained a PhD degree in the last five years. This measure will support young researchers starting their academic careers.

### DISSEMINATION AND IMPACT

Jean Monnet Modules are required to disseminate and exploit the results of the organised teaching and research activities beyond the scope of the stakeholders directly involved. This will considerably increase the impact and contribute to a systemic change.

To increase their impact they should include in their dissemination activities the creation and offer of open educational resources (OER) and involve open education activities to respond to technological progress. This will foster more flexible and creative ways of learning and reach out to an increasing number of students, professionals, policy makers and other interested groups.

All coordinators of Jean Monnet Modules will be asked to update their respective section of the Erasmus+ specific online tool where all the information about the Jean Monnet Activities will be hosted. They will be encouraged strongly to use the relevant existing platforms and tools (i.e. the Jean Monnet directory, the Jean Monnet virtual community). These sections, which are part of the general IT tool for Erasmus+, will keep the wider public informed about the institutions and their Jean Monnet courses. Grant holders will be asked to regularly update the tool with the results of their work.

Coordinators of Jean Monnet Modules are encouraged to:

- publish at least one peer reviewed article during the grant period. The grant will cover part of the publication and, if need be, of the translation costs;
- participate in dissemination and information events at national and European level;
- organise events (lectures, seminars, workshops, etc.) with policy makers at local (e.g. mayors and counsellors), regional and national level as well as with organised civil society and schools;
- disseminate the results of their activities via the organisation of seminars or lectures geared and adapted to the general public and civil society representatives;
- network with other coordinators of Modules, Centres of Excellence, Jean Monnet Chairs and supported Institutions;
- apply open educational resources (OER), publish the summaries, content and schedule of their activities as well as the expected outcomes.

## WHAT ARE THE FUNDING RULES?

The maximum grant that can be awarded is 30 000 EUR that can represent the maximum of 75% of the total cost of the Jean Monnet Module.

A system based on a combination of scales of unit costs and flat-rate financing for the awarding of grants under the Jean Monnet Activities applies. This system is determined on the basis of a calculated national teaching cost per hour. The following method is used:

- **Teaching scale of unit costs** : the calculated national unit cost per hour D.1 is multiplied by the number of teaching hours ;

- **Additional flat-rate financing**: a 'top-up' percentage of 40% for a Jean Monnet Module is added to the above mentioned unit costs basis.

The final grant is then obtained by applying the maximum 75% EU funding of total calculated grant and by respecting the maximum grant ceiling for a Jean Monnet Module (30 000 EUR).

The specific amounts applying to Jean Monnet Modules can be found in the section "Jean Monnet unit costs" at the end of the Jean Monnet chapter in this Part of the Guide.

# JEAN MONNET CHAIRS

## WHAT IS A JEAN MONNET CHAIR?

A Jean Monnet Chair is a teaching post with a specialisation in European Union studies for university professors for a duration of three years A Jean Monnet Chair must be held by only one professor, who must provide the minimum of 90 teaching hours per academic year. Teaching hours are taken to include direct contact hours in the context of group lectures, seminars, tutorials and may include any of the aforementioned in a distance learning format but do not include individual instruction and/or supervision.

## WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Main activities (minimum of 90 hours per academic year):

- deepen teaching in European Union studies embodied in an official curriculum of a higher education institution;
- provide in-depth teaching on European Union matters for future professionals in fields which are in increasing demand on the labour market;

Additional activities:

- provide teaching/lectures to students from other departments (e.g. architecture, medicine, etc) to better prepare them for their future professional life.
- encourage, advise and mentor the young generation of teachers and researchers in European Union studies subject areas;
- conduct, monitor and supervise research on EU subjects, for other educational levels such as teacher training and compulsory education;
- organise activities (conferences, seminars/webinars, workshops, etc.) targeting to policy makers at local, regional and national level as well as to civil society.

## WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN A JEAN MONNET CHAIR?

Jean Monnet Chairs are an integral part of the higher education institution that concludes the grant agreement/decision.

Jean Monnet Chairs are inscribed in their institution's official academic activities. The higher education institutions are requested to support Jean Monnet Chair holders in their teaching, research and reflection activities, allowing the widest possible range of curricula to benefit from the courses; they should recognise the teaching activities developed.

Higher education institutions have the final responsibility for their applications. They are obliged to maintain the activities of a Jean Monnet Chair during the entire duration of the project. If the institution is obliged to replace Chair holder, a written request for approval has to be sent to the Executive Agency. Moreover the new proposed chair holder must have the same level of specialisation in European Union studies.

## WHAT ARE THE CRITERIA USED TO ASSESS A JEAN MONNET CHAIR?

Here below are listed the formal criteria that a Jean Monnet Chair must respect in order to be eligible for an Erasmus+ grant:

### ELIGIBILITY CRITERIA

| | |
|---|---|
| **Who can apply?** | A Higher Education Institution (HEI) established in any country of the world. HEIs established in Programme Countries must hold a valid Erasmus Charter for Higher Education (ECHE). An ECHE is not required for participating HEIs in Partner Countries.<br>Individuals cannot apply directly for a grant. |
| **Profile of Jean Monnet Chairs** | Jean Monnet Chair holders must be permanent staff members at the applicant institution and have the rank of professor. They may not be a "visiting professor" at the HEI applying for the grant. |
| **Duration of project** | Three years. |

| | |
|---|---|
| **Duration of activity** | Jean Monnet Chair holders must teach a minimum of 90 hours per academic year (for three consecutive years) in the field of European Union studies at the applicant higher education institution. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **22 February at 12:00 (midday Brussels time)** for projects starting on 1 September of the same year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

Applicant organisations will also be assessed against **exclusion and selection criteria**. For more information please consult Part C of this Guide.

### AWARD CRITERIA

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project**<br>(Maximum 25 points) | ▪ The relevance of the proposal to:<br>- the objectives and priorities of the Action (see sections "What are the aims of Jean Monnet Actions" ).<br>▪ The extent to which the proposal:<br>- is submitted in favour of an academic with an excellent profile in a specific field of European Union studies ;<br>- is suitable for fostering the development of new teaching, research or debating activities;<br>- includes the use of new methodologies, tools and technologies;<br>- promotes and gives greater visibility to this European studies/issues both within the institution participating in the Jean Monnet Action and outside.<br>▪ The relevance of the proposal to priority target groups of the Action:<br>- institutions established in countries not covered by the Jean Monnet Action;<br>- institutions or academics not yet in receipt of Jean Monnet funding;<br>- specific EU related subjects in studies which have had limited exposure to but are increasingly affected by European aspects. |
| **Quality of the project design and implementation**<br>(Maximum 25 points) | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, evaluation, follow-up and dissemination;<br>▪ The consistency between project objectives, activities and the budget proposed ;<br>▪ The quality and feasibility of the methodology proposed. |
| **Quality of the project team**<br>(Maximum 25 points) | ▪ The pertinence of the profile and expertise of key staff involved - both in the academic and non-academic domains - with the activities carried out in the project. |

| | |
|---|---|
| **Impact and dissemination**<br>(Maximum 25 points) | ▪ The quality of measures for evaluating the outcomes of the teaching activities;<br>▪ The potential impact of the project:<br>- on the institution hosting the Jean Monnet Action;<br>- on the students and learners benefiting from the Jean Monnet Action;<br>- on other organisations and individuals involved at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the activities within and outside the institution hosting the Jean Monnet Action;<br>▪ If relevant, the extent to which the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences and does not contain disproportionate limitations. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least 13 points in each of the categories of award criteria mentioned above.

## WHAT ELSE SHOULD YOU KNOW ABOUT A JEAN MONNET CHAIR?

### DISSEMINATION AND IMPACT

Jean Monnet Chairs are required to disseminate and exploit the results of the organised activities beyond the stakeholders directly involved. This will considerably increase the impact and contribute to a systemic change.

To increase their impact the Chair holders should include in their dissemination activities the creation and offer of open educational resources (OER) and involve open education activities to respond to technological progress. This will foster more flexible and creative ways of learning and reach out to a considerably increasing number of students, professionals, policy makers and other interested groups.

Jean Monnet Chairs will be asked to update their respective section of the Erasmus+ specific online tool where all the information about the Jean Monnet Activities will be hosted. They will be strongly encouraged to use the relevant existing platforms and tools (i.e. the Jean Monnet directory, the Jean Monnet virtual community). These functions, as part of the general IT tool for Erasmus+, will ensure that the wider public is informed about the institutions and their Jean Monnet courses. Grant holders will be asked to regularly update the tool with the results of their work.

Jean Monnet Chairs are encouraged to:

- publish at least one book within the University Press during the grant period. The grant will cover part of the publication and, if need be, part of the translation costs;
- participate in dissemination and information events at national and European level;
- organise events (lectures, seminars, workshops, etc.) with policy makers at local (e.g. mayors and counsellors), regional and national level as well as with organised civil society and schools;
- disseminate the results of their activities via the organisation of seminars or lectures geared and adapted to the general public and civil society representatives;
- network with other Jean Monnet Chairs, coordinators of Modules, Centres of Excellence and supported Institutions;
- apply open educational resources (OER), publish the summaries, content and schedule of their activities as well as the expected outcomes.

## WHAT ARE THE FUNDING RULES?

The maximum grant that can be awarded is 50 000 EUR that can represent the maximum of 75% of the total cost of the Jean Monnet Chair.

A system based on a combination of scales of unit costs and flat-rate financing for the awarding of grants under the Jean Monnet Activities applies. This system is determined on the basis of a calculated national teaching cost per hour. The following method is used:

- **Teaching scale of unit cost**: the calculated national teaching unit cost per hour D.1 is multiplied by the teaching number of hours of the Jean Monnet Chair;

- **Additional flat-rate financing**: a 'top-up' percentage of 10% for a Jean Monnet Chair is added to the above mentioned unit costs basis. This top-up percentage takes account of the additional academic activities included in a Chair such as staff costs, travel and subsistence costs, dissemination costs, costs for teaching materials and indirect costs, etc..

The final grant is then obtained by applying the maximum 75% EU funding of total calculated amount and by respecting the maximum grant ceiling for a Jean Monnet Chair (50 000 EUR).

The specific amounts applying to Jean Monnet Chairs can be found in the section "Jean Monnet unit costs" at the end of the Jean Monnet chapter in this Part of the Guide

# JEAN MONNET CENTRES OF EXCELLENCE

## WHAT IS A JEAN MONNET CENTRE OF EXCELLENCE?

A Jean Monnet Centre of Excellence is a focal point of competence and knowledge on European Union subjects.

A Jean Monnet Centre of Excellence gathers the expertise and competences of high-level experts and aims at developing synergies between the various disciplines and resources in European studies, as well as at creating joint transnational activities and structural links with academic institutions in other countries. It also ensures openness to civil society.

Jean Monnet Centres of Excellence have a major role in reaching out to students from faculties not normally dealing with European Union issues as well as to policy makers, civil servants, organised civil society and the general public at large.

## WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

A Jean Monnet Centre of Excellence must develop a strategic three-year annual plan including a wide range of activities, such as:

- organising and coordinating human and documentary resources related to European Union studies;
- leading research activities in specific European Union subjects (research function);
- developing content and tools on EU subjects to update and complement the current courses and curricula (teaching function);
- enhancing the debate and exchange of experiences about the EU, where possible in partnership with local stakeholders and/or EU Representations Offices in Member States and EU Delegations in third countries (think-tank function);
- systematic publication of the results of research activities.

## WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN A JEAN MONNET CENTRE OF EXCELLENCE?

Higher education institutions planning to establish a Jean Monnet Centre of Excellence are expected to reflect on its strategic development. They should provide guidance and a vision for the best experts available among the teaching and research staff for creating synergies allowing high-level collaborative work on specific EU subjects. They should support and promote the initiatives of the Centre and assist their development.

Higher education institutions are obliged to maintain the activities of a Jean Monnet Centre of Excellence during the entire duration of the project including replacing the academic coordinator if the need arises. If the institution is obliged to replace the original academic coordinator, a written request for approval has to be sent to the Executive Agency.

A Centre of Excellence may involve the co-operation of several institutions/organisations established in the same city or region. In any case, it must be a clearly labelled institute or structure specialised in European Union studies and must be hosted by a higher education institution.

## WHAT ARE THE CRITERIA USED TO ASSESS A JEAN MONNET CENTRE OF EXCELLENCE?

Here below are listed the formal criteria that a Jean Monnet Centre of Excellence must respect in order to be eligible for an Erasmus+ grant:

## ELIGIBILITY CRITERIA

| | |
|---|---|
| **Who can apply?** | A higher education institution (HEI) established in any country of the world. HEIs established in Programme Countries must hold a valid Erasmus Charter for Higher Education (ECHE). An ECHE is not required for participating HEIs in Partner Countries.<br>Individuals cannot apply directly for a grant. |
| **Duration of project** | Three years. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **22 February at 12:00 (midday Brussels time)** for projects starting on 1 September of the same year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |
| **Other criteria** | Only one Jean Monnet Centre of Excellence can be supported at the same time in any given higher education institution. |

Applicant organisations will be assessed against **exclusion and selection criteria**. For more information please consult Part C of this Guide.

## AWARD CRITERIA

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project**<br>(Maximum 25 points) | ▪ The relevance of the proposal to:<br>- the objectives and priorities of the Action (see sections "What are the aims of Jean Monnet" and "What is a Jean Monnet Centre of Excellence" );<br>- the needs and objectives of the participating organisations and of the academics involved.<br>▪ The extent to which the proposal:<br>- is suitable for fostering the development of new teaching, research or debating activities;<br>- demonstrates evidence of academic added value;<br>- promotes and gives greater visibility to European studies/issues both within the institution hosting the Jean Monnet activities and outside.<br>▪ The relevance of the proposal to priority target groups of the Action:<br>- institutions established in countries not covered by the Jean Monnet Action;<br>- institutions or academics not yet in receipt of Jean Monnet funding. |
| **Quality of the project design and implementation**<br>(Maximum 25 points) | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, evaluation, follow-up and dissemination;<br>▪ The consistency between project objectives, activities and budget proposed;<br>▪ The quality and feasibility of the methodology proposed. |
| **Quality of the project team**<br>(Maximum 25 points) | ▪ The pertinence of the profile and expertise of key academic staff involved - both in the academic and non-academic domains -with the activities carried out in the project. |

| | |
|---|---|
| **Impact and dissemination**<br>(Maximum 25 points) | ▪ The quality of measures for evaluating the outcomes of the teaching activities;<br>▪ The potential impact of the project:<br>- on the institution(s) participating in the Jean Monnet Action;<br>- on the students and learners benefiting from the Jean Monnet Action;<br>- on other organisations and individuals involved at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the activities within and outside the institution hosting the Jean Monnet Action;<br>▪ If relevant, the extent to which the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limitations. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least 13 points in each of the categories of award criteria mentioned above.

## WHAT ELSE SHOULD YOU KNOW ABOUT A JEAN MONNET CENTRE OF EXCELLENCE?

### DISSEMINATION AND IMPACT

Jean Monnet Centres of Excellence are required to disseminate and exploit the results of the organised teaching and research activities beyond the stakeholders directly involved. This will considerably increase the impact and contribute to a systemic change.

To increase their impact they should include in their dissemination activities the creation and offer of open educational resources (OER) and involve open education activities to respond to technological progress. This will foster more flexible and creative ways of learning and reach out to a considerably increasing number of students, professionals, policy makers and other interested groups.

Jean Monnet Centres of Excellence will be asked to update their respective section of the Erasmus+ specific online tool where all the information about the Jean Monnet Activities will be hosted. They will be strongly encouraged to use the relevant existing platforms and tools (i.e. the Jean Monnet directory, the Jean Monnet virtual community). These functions, as part of the general IT tool for Erasmus+, will ensure that the wider public is informed about the institutions and their Jean Monnet courses. Grant holders will be asked to regularly update the tool with the results of their work.

Centres of Excellence are encouraged to:

- participate in dissemination and information events at European and national level;
- organise events (lectures, seminars, workshops, etc.) with policy makers at local (e.g. mayors and counsellors), regional and national level as well as with organised civil society and schools;
- disseminate the results of their activities via the organisation of seminars or lectures geared and adapted to the general public and civil society representatives;
- network with other Centres of Excellence, Jean Monnet Chairs, coordinators of Modules and supported Institutions;
- apply open educational resources (OER), publish the summaries, content and schedule of their activities as well as the expected outcomes.

## WHAT ARE THE FUNDING RULES?

If the project is selected, the following funding rules will apply to the grant:

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Activity costs** | Eligible direct costs<br>▪ Staff costs<br>▪ Travel and subsistence costs<br>▪ Subcontracting costs (maximum 30% of eligible direct costs)<br>▪ Equipment costs (maximum 10% of eligible direct costs)<br>▪ Teaching costs<br>▪ Other costs (including costs for any compulsory financial audit/audit certificate).<br><br>Eligible indirect costs<br>A flat-rate amount, not exceeding 7% of the eligible direct costs of the project, is eligible under indirect costs, representing the beneficiary's general administrative costs which can be regarded as chargeable to the project (e.g. electricity or internet bills, costs for premises, cost of permanent staff, etc.) | Real costs | 80% of the total eligible costs (unless a lower % of grant is requested by the applicant)<br>Maximum € 100 000 | Conditional: objectives and work programme must be clearly outlined in the application form |

## JEAN MONNET SUPPORT TO ASSOCIATIONS

Jean Monnet supports associations that have as their explicit purpose to contribute to the study of the European integration process. Such associations should be interdisciplinary and open to all interested professors, teachers and researchers specialising in European Union issues in the relevant country or region. They should be representative of the academic community in European Union studies at regional, national or supranational level. Support will be given only to associations that are officially registered and have independent legal status.

### WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Over the lifetime of the grant, associations may typically realise a broad range of activities, such as for example:

- organise and carry out statutory activities of associations dealing with European Union studies and European Union issues (e.g. the publication of a newsletter, the setting up of a dedicated website, the organisation of the annual board meeting, the organisation of specific promotional events aimed at providing greater visibility to European Union subjects, etc.);

- perform research in the field of specific European issues in order to advise local, regional, national and European policy makers and disseminate the outcomes among the institutions involved in these issues, including the EU Institutions as well as a wider public thus enhancing active citizenship.

### WHAT IS THE ROLE OF ASSOCIATIONS?

Jean Monnet Associations should become reference points in the European Union subject areas they cover.

They will assume the role of multipliers and they will disseminate knowledge; they will also contribute to collecting and capitalizing information as well as providing analysis and visions on specific subjects.

Associations are ultimately responsible for their proposals. They are obliged to implement the activities described in their work programme during the entire duration of the grant.

### WHAT ARE THE CRITERIA USED TO ASSESS A JEAN MONNET SUPPORT TO ASSOCIATIONS?

Here below are listed the formal criteria that a Jean Monnet support to associations must respect in order to be eligible for an Erasmus+ grant:

#### ELIGIBILITY CRITERIA

| | |
|---|---|
| **Who can apply?** | Any association of professors and researchers specialising in European Union Studies, established in any country of the world. The explicit purpose of the association must be to contribute to the study of the European integration process at national or transnational level. The association must have an interdisciplinary character.<br>Individuals cannot apply directly for a grant. |
| **Duration of project** | Three years. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by the **22 February at 12:00 (midday Brussels time)** for projects starting on 1 September of the same year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

Applicant organisations will also be assessed against **exclusion and selection criteria**. For more information please consult Part C of this Guide.

## AWARD CRITERIA

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project**<br><br>**(Maximum 25 points)** | ▪ The relevance of the proposal to:<br>- the objectives and priorities of the Action (Please see sections "What is the aim of Jean Monnet " and "What is Jean Monnet support to associations").<br>▪ The extent to which the proposal:<br>- is suitable for supporting the statutory activities of the association and for performing research in European issues .<br>- enhances advice to local, regional, national and European policy makers.<br>The relevance of the proposal to priority target groups of the Action:<br>- associations established in countries not covered by the Jean Monnet Action;<br>- associations not yet in receipt of Jean Monnet funding. |
| **Quality of the project design and implementation**<br><br>**(Maximum 25 points)** | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, evaluation, follow-up and dissemination;<br>▪ The consistency between project objectives, activities and budget proposed;<br>▪ The quality and feasibility of the methodology proposed. |
| **Quality of the project team**<br><br>**(Maximum 25 points)** | ▪ The pertinence of the profile and expertise of key staff involved - both in the academic and non-academic domains - with the research activities proposed in the project. |
| **Impact and dissemination**<br><br>**(Maximum 25 points)** | ▪ The quality of measures for evaluating the outcomes of the activities;<br>▪ The potential impact of the project:<br>- on the association(s) participating in the Jean Monnet Action;<br>- on other organisations and policy makers at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the activities within and outside the association hosting the Jean Monnet Action. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least 13 points in each of the categories of award criteria mentioned above.

## WHAT ELSE SHOULD YOU KNOW ABOUT A JEAN MONNET SUPPORT TO ASSOCIATIONS?

### DISSEMINATION AND IMPACT

Associations selected under this Action are required to disseminate and exploit the results of their promotional activities beyond the stakeholders directly involved. This will considerably increase the impact and contribute to a systemic change.

To increase their impact they should include in their dissemination activities the creation and offer of open educational resources (OER) and involve open education activities to respond to technological progress. This will foster more flexible and creative ways of learning and reach out to a considerably increasing number of students, professionals, policy makers and other interested groups.

All Associations, awarded a Jean Monnet grant, will be asked to update their respective section of the Erasmus+ specific online tool where all the information about the Jean Monnet Activities will be hosted. They will be strongly encouraged to use the relevant existing platforms and tools (i.e. the Jean Monnet directory, the Jean Monnet virtual community). These functions, as part of the general IT tool for Erasmus+, will ensure that the wider public is informed about the associations and their Jean Monnet activities. Grant holders will be asked to regularly update the tool with the results of their work.

If the project is selected, the following funding rules will apply to the grant:

**JEAN MONNET SUPPORT TO ASSOCIATIONS**

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Activity costs** | Eligible direct costs<br>▪ Staff costs<br>▪ Travel and subsistence costs<br>▪ Subcontracting costs (maximum 30% of eligible direct costs)<br>▪ Equipment costs (maximum 10% of eligible direct costs)<br>▪ Other costs (including costs for any compulsory financial audit/audit certificate).<br><br>Eligible indirect costs<br>A flat-rate amount, not exceeding 7% of the eligible direct costs of the project, is eligible under indirect costs, representing the beneficiary's general administrative costs which can be regarded as chargeable to the project (e.g. electricity or internet bills, costs for premises, cost of permanent staff, etc.) | Real costs | Maximum € 50 000<br><br>80% of the total eligible costs (unless a lower % of grant is requested by the applicant). | Conditional: objectives and work programme must be clearly outlined in the application form |

# JEAN MONNET NETWORKS (POLICY DEBATE WITH THE ACADEMIC WORLD)

## WHAT IS A JEAN MONNET NETWORK?

Jean Monnet Networks foster the creation and development of consortia of international players (HEIs, Centres of Excellence, departments, teams, individual experts, etc.) in the area of European Union studies.

They contribute to gathering information, exchanging practices, building knowledge and promoting the European integration process across the world. This Action can also support the enhancement of existing networks supporting specific activities, notably fostering the participation of young researchers in EU-related themes.

These projects will be based on unilateral proposals, focused on activities that cannot be achieved successfully at a national level and require the involvement of a minimum of three partner institutions (including the applicant institution) from three different countries. Their aim is to undertake projects that have a multinational rather than a national dimension.

## WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Over the lifetime of a project, networks may typically realise a broad range of activities, such as for example:

- gathering and promoting information and results on methodologies applied to high-level research and teaching on EU studies;
- enhancing cooperation between different higher education institutions and other relevant bodies throughout Europe and around the world;
- exchanging knowledge and expertise with a view to mutually enhancing good practices;
- fostering cooperation and creating a high knowledge exchange platform with public actors and the European Commission services on highly relevant EU subjects.

## WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN A JEAN MONNET NETWORKS?

Jean Monnet Networks should become reference points in the European Union subject areas they cover. They will take the role of multipliers and disseminate knowledge; they will also contribute to collect and capitalize information as well as provide analysis and visions on specific subjects.

Higher education institutions coordinating Jean Monnet Networks have the final responsibility for their proposals. They are obliged to implement the activities described in their work programme during the entire duration of the grant.

## WHAT ARE THE CRITERIA USED TO ASSESS A JEAN MONNET SUPPORT TO NETWORKS?

Here below are listed the formal criteria that a Jean Monnet Network must respect in order to be eligible for an Erasmus+ grant:

### ELIGIBILITY CRITERIA

| | |
|---|---|
| **Who can apply?** | A higher education institution (HEI) or other organisation active in the European integration area, established in any country of the world. HEIs located in Erasmus+ Programme Countries must hold a valid Erasmus Charter for Higher Education (ECHE). An ECHE is not required for participating HEIs in Partner Countries. The applicant must be the coordinator of the network that comprises a minimum of three participating institutions from three different countries. The designated European institutions (identified in the Regulation establishing the Erasmus+ Programme) pursuing an aim of European interest are not eligible to apply under this Action. |
| **Duration of project** | Three years. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **22 February at 12:00 (midday Brussels time)** For projects starting on 1 September of the same year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

Applicant organisations will also be assessed against **exclusion and selection criteria**. For more information please consult Part C of this Guide.

## AWARD CRITERIA

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (Maximum 25 points)** | ▪ The relevance of the proposal to:<br>- the objectives and priorities of the Action (see sections "What are the aims of Jean Monnet" and "What is a Jean Monnet Network").<br>▪ The extent to which the proposal:<br>- is suitable for fostering the development of new teaching, research or debating activities;<br>- demonstrates evidence of academic added value;<br>- promotes and gives greater visibility to this European studies/issues both within the institution participating in the Jean Monnet Action and outside.<br>▪ The relevance of the proposal to priority target groups of the Action:<br>- institutions established in countries not covered by the Jean Monnet Action;<br>- institutions or academics not yet in receipt of Jean Monnet funding. |
| **Quality of the project design and implementation (Maximum 25 points)** | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, evaluation, follow-up and dissemination;<br>▪ The consistency between project objectives, activities and budget proposed;<br>▪ The quality and feasibility of the methodology proposed;<br>▪ The design and management of Network activities including communication channels between the members. |
| **Quality of the project team (Maximum 25 points)** | ▪ The pertinence of the profile and expertise of key staff involved - both in the academic and the non-academic domains - with the activities carried out in the project;<br>▪ The composition of the Network in terms of geographical coverage and complementarity of competencies. |
| **Impact and dissemination (Maximum 25 points)** | ▪ The quality of measures for evaluating the outcomes of the teaching activities;<br>▪ The potential impact and multiplier effect of the project:<br>- on the institution hosting the Jean Monnet Action and on the member institutions of the Network;<br>- on the students and learners benefiting from the Jean Monnet Action;<br>- on other organisations and individuals involved at local, regional, national, transnational and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the activities within and outside the institution hosting the Jean Monnet Action;<br>▪ If relevant, the extent to which the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limitations. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least 13 points in each of the categories of award criteria mentioned above.

## WHAT ELSE SHOULD YOU KNOW ABOUT A JEAN MONNET SUPPORT TO NETWORKS?

### DISSEMINATION AND IMPACT

Networks selected under this Action are required to disseminate and exploit the results of their activities beyond the participants directly involved. This will considerably increase the impact and contribute to a systemic change.

To increase their impact they should include in their dissemination activities the creation of tools and events adapted to their objectives.

All Jean Monnet Networks will be asked to update their respective section of the Erasmus+ specific online tool where all the information about the Jean Monnet Activities will be hosted. They will be strongly encouraged to use the relevant existing platforms and tools (i.e. the Jean Monnet directory, the Jean Monnet virtual community). These functions, as part of the general IT tool for Erasmus+ ensures that the wider public is informed about the Jean Monnet Network activities. Grant holders will be asked to regularly update the tool with the results of their work.

## WHAT ARE THE FUNDING RULES?

If the project is selected, the following funding rules will apply to the grant:

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Activity costs** | Eligible direct costs<br>▪ Staff costs<br>▪ Travel and subsistence costs<br>▪ Subcontracting costs (maximum 30% of eligible direct costs)<br>▪ Equipment costs (maximum 10% of eligible direct costs)<br>▪ Teaching costs<br>▪ Other costs (including costs for any compulsory financial audit/audit certificate).<br><br>Eligible indirect costs<br>A flat-rate amount, not exceeding 7% of the eligible direct costs of the project, is eligible under indirect costs, representing the beneficiary's general administrative costs which can be regarded as chargeable to the project (e.g. electricity or internet bills, costs for premises, cost of permanent staff, etc.) | Real costs | Maximum € 300 000<br><br>80% of the total eligible costs (unless a lower % of grant is requested by the applicant). | Conditional: objectives and work programme must be clearly outlined in the application form |

# JEAN MONNET PROJECTS (POLICY DEBATE WITH THE ACADEMIC WORLD)

## WHAT IS A JEAN MONNET PROJECT?

Jean Monnet Projects support innovation, cross-fertilisation and the spread of European Union content. These projects will be based on unilateral proposals - although the proposed activities may involve other partners - and may last between 12 and 24 months.

- **"Innovation"** projects will explore new angles and different methodologies in view of making European Union subjects more attractive and adapted to various kinds of target populations (e.g. projects on Learning EU @ School);
- **"Cross-fertilisation"** projects will promote discussion and reflection on European Union issues and enhance knowledge about the Union and its processes. These projects will aim at boosting EU knowledge in specific contexts;
- "**Spread content"** projects will mainly concern information and dissemination activities.

## WHICH ACTIVITIES ARE SUPPORTED UNDER JEAN MONNET PROJECTS?

Over their lifetime, Jean Monnet Projects may typically realise a broad range of activities, such as for example:

"Innovation"
- develop and test newly designed methodologies, content and tools on specific European Union topics;
- create virtual classrooms on specific subject areas and testing them in different contexts;
- design, produce and implement self-training tools promoting active citizenship in the EU;
- develop and deliver appropriate pedagogical content and new/adapted didactic material for the teaching of European Union issues at the level of primary and secondary education (Learning EU @ School);
- design and implement of teacher training activities and continuing education for teachers, provide them with the appropriate knowledge and skills to teach European Union subjects;
- provide specifically designed activities on the European Union to pupils at the level of primary and secondary schools and in vocational education and training institutions;

"Cross-fertilisation"
- support the creation of EU studies and/or boost the existing knowledge and/or enhance the dynamic of a "department/chair/research team" in a given country at a Higher Education Institution which has expressed a specific interest/need;
- joint develop content and co-teaching for students involving several institutions. Participating institutions may organise common activities and the preparation of tools supporting their courses;

"Spread content"
- support information and dissemination activities for staff of the public administration, for experts in specific subjects and for civil society as a whole;
- organise conferences, seminars and/or roundtables in relevant European Union issues.

## WHAT IS THE ROLE OF ORGANISATIONS PARTICIPATING IN A JEAN MONNET PROJECT?

The institution proposing the project is required to prepare a clear and sustainable strategy with a detailed work programme including information about the expected results. It should justify the need of the activities proposed, the direct and indirect beneficiaries, it should guarantee the active role of all the participating organisations.

Proposals are signed by the legal representative of the higher education institutions (or other eligible organisations) and provide information about the legal status, objectives and activities of the applicant institution.
Higher education institutions (or other eligible organisations) have the final responsibility for their proposals. They are obliged to implement the activities described in their projects during the entire duration of the project.

## WHAT ARE THE CRITERIA USED TO ASSESS A JEAN MONNET PROJECT?

Here below are listed the formal criteria that a Jean Monnet Project must respect in order to be eligible for an Erasmus+ grant:

## ELIGIBILITY CRITERIA

| | |
|---|---|
| **Who can apply?** | Higher education institutions or other organisations active in the European Union subject area, established in any country of the world. HEIs located in Erasmus+ Programme Countries must hold a valid Erasmus Charter for Higher Education (ECHE). An ECHE is not required for participating HEIs in Partner Countries. The designated institutions (identified in the Regulation establishing the Erasmus+ Programme) pursuing an aim of European interest are not eligible to apply under this Action. Primary and secondary education establishments are not eligible to apply, although they may actively contribute to the realisation of the activities. |
| **Duration of project** | 12, 18 or 24 months. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **22 February at 12:00 (midday Brussels time)** for projects starting on 1 September of the same year. |
| **How to apply?** | Please see Part C of this Guide for details on how to apply. |

Applicant organisations will also be assessed against **exclusion and selection criteria**. For more information please consult Part C of this Guide.

## AWARD CRITERIA

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (Maximum 25 points)** | ▪ The relevance of the proposal to:<br>- the objectives and priorities of the Action (see sections "What are the aims of the Jean Monnet" and "What is a Jean Monnet Project");<br>- the specific objectives of the "Jean Monnet Projects" for "Innovation", "Cross-fertilisation", "Spread content".<br>▪ The extent to which the proposal:<br>- is suitable for fostering the development of new teaching, research or debating activities;<br>- demonstrates evidence of academic added value ;<br>- promotes and gives greater visibility to this European studies/issues both within the institution participating in the Jean Monnet Action and outside.<br>▪ The relevance of the proposal to priority target groups of the Action:<br>- institutions established in countries not covered by the Jean Monnet Action;<br>- institutions or academics not yet in receipt of Jean Monnet funding. |
| **Quality of the project design and implementation (Maximum 25 points)** | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, evaluation, follow-up and dissemination;<br>▪ The consistency between project objectives, activities and budget proposed;<br>▪ The quality and feasibility of the methodology proposed. |
| **Quality of the project team (Maximum 25 points)** | ▪ The pertinence of the profile and expertise of key staff - both in the academic and the non-academic domains - involved with the activities carried out in the project;<br>▪ For projects targeting primary and secondary school students: the involvement of project staff with relevant pedagogical skills. |

| | |
|---|---|
| **Impact and dissemination (Maximum 25 points)** | ▪ The quality of measures for evaluating the outcomes of the teaching activities;<br>▪ The potential impact of the project:<br>- on the institution hosting the Jean Monnet Action;<br>- on the students and learners benefiting from the Jean Monnet Action;<br>- on other organisations and individuals involved at local, regional, national and/or European levels.<br>▪ The appropriateness and quality of measures aimed at disseminating the outcomes of the activities within and outside the institution hosting the Jean Monnet Action;<br>▪ If relevant, the extent to which the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limitations. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least 13 points in each of the categories of award criteria mentioned above.

## WHAT ELSE SHOULD YOU KNOW ABOUT A JEAN MONNET PROJECT?

### DISSEMINATION AND IMPACT

Jean Monnet Projects are required to disseminate and exploit the results of the activities beyond the stakeholders directly involved. This will considerably increase the impact and contribute to a systemic change.

Jean Monnet Projects will be asked to update their respective section of the Erasmus+ specific online tool where all the information about the Jean Monnet Activities will be hosted. They will be strongly encouraged to use the relevant existing platforms and tools (i.e. the Jean Monnet directory, the Jean Monnet virtual community). These functions, as part of the general IT tool for Erasmus+, will ensure that the wider public is informed about the results. Grant holders will be asked to regularly update the tool with the results of their work.

Jean Monnet Projects are encouraged to:

- participate in dissemination and information events at national and European level;
- organise events (lectures, seminars, workshops, etc.) with policy makers at local (e.g. mayors and counsellors), regional and national level as well as with organised civil society and schools;
- disseminate the results of their activities via the organisation of seminars or lectures geared and adapted to general public and civil society representatives;
- network with Centres of Excellence, Jean Monnet Chairs, coordinators of Modules and supported Institutions and Associations;
- apply open educational resources (OER), publish the summaries, content and schedule of their activities as well as the expected outcomes.

## WHAT ARE THE FUNDING RULES?

The budget of the project must be drafted according to the following funding rules (in euro):

| **Maximum grant awarded for a Jean Monnet Project:** | **60 000 EUR (representing maximum of 75% of the total costs)** |
|---|---|

| **Eligible costs** | | **Financing mechanism** | **Amount** |
|---|---|---|---|
| **Participation in conferences** | Contribution to costs linked to the organisation of conferences, seminars, workshops, etc., excluding costs linked to the participation of non-local speakers | Contribution to unit costs | D.2 per day per participant |
| **Travel (non-local speakers)** | Contribution to the travel costs of non-local speakers attending the conferences, based on the travel distance. Travel distances must be calculated using the distance calculator supported by the European Commission[224], indicating the distance of a one-way travel to calculate the amount of the EU grant that will support the round trip[225] | Unit costs | For travel distances between 100 and 499 KM: 180 EUR per participant |
| | | | For travel distances between 500 and 1999 KM: 275 EUR per participant |
| | | | For travel distances between 2000 and 2999 KM: 360 EUR per participant |
| | | | For travel distances between 3000 and 3999 KM: 530 EUR per participant |
| | | | For travel distances between 4000 and 7999 KM: 820 EUR per participant |
| | | | For travel distances of 8000 KM or more: 1500 EUR per participant |
| **Subsistence (non-local speakers)** | Contribution to the subsistence costs of non-local speakers attending the conferences | Contribution to unit costs | D.3 per day per participant |

[224] http://ec.europa.eu/programmes/erasmus-plus/tools/distance_en.htm

[225] For example, if a person from Madrid (Spain) is taking part in an activity taking place in Rome (Italy), the applicant will a) calculate the distance from Madrid to Rome (1365,28 KM); b) select the applicable travel distance band ( i.e. between 500 and 1999 KM) and c) calculate the EU grant that will provide a contribution to the costs of travel of the non-local speaker from Madrid to Rome and return (275 EUR).

| | | | |
|---|---|---|---|
| **Complementary activities** | Contribution to any additional peripheral cost related to complementary activities developed in this Action: e.g. academic follow-up of the event, creation and maintenance of a website, design, printing and dissemination of publications; interpretation costs; production costs | Lump sum | 25.000 EUR |

The specific amounts applying to Jean Monnet Projects can be found in the section "Jean Monnet unit costs" at the end of the Jean Monnet chapter in this Part of the Guide.

## JEAN MONNET UNIT COSTS

### D.1 – NATIONAL TEACHING COSTS (IN EURO PER TEACHING HOUR)

The amounts depend on the country where the teaching activity takes place.

| **Programme Countries** | |
|---|---|
| Belgium | 200 |
| Bulgaria | 80 |
| Czech Republic | 107 |
| Denmark | 200 |
| Germany | 200 |
| Estonia | 107 |
| Ireland | 172 |
| Greece | 129 |
| Spain | 161 |
| France | 184 |
| Croatia | 96 |
| Italy | 166 |
| Cyprus | 151 |
| Latvia | 98 |
| Lithuania | 106 |
| Luxembourg | 200 |
| Hungary | 104 |
| Malta | 138 |
| Netherlands | 200 |
| Austria | 200 |
| Poland | 104 |
| Portugal | 126 |
| Romania | 81 |
| Slovenia | 136 |
| Slovakia | 114 |
| Finland | 193 |
| Sweden | 200 |
| United Kingdom | 184 |
| former Yugoslav Republic of Macedonia | 80 |
| Iceland | 159 |
| Liechtenstein | 80 |
| Norway | 200 |
| Turkey | 87 |
| **Partner Countries** | |
| Antigua and Barbuda | 92 |
| Australia | 200 |
| Bahrain | 110 |
| Barbados | 94 |
| Brunei | 200 |
| Canada | 200 |
| Chile | 83 |
| Equatorial Guinea | 131 |
| Hong Kong | 200 |
| Israel | 144 |
| Japan | 178 |
| Korea, Republic of | 153 |
| Kuwait | 200 |
| Libya | 90 |
| Mexico | 86 |
| New-Zealand | 153 |
| Oman | 131 |
| Qatar | 200 |
| Saint Kitts and Nevis | 84 |
| Saudi Arabia | 126 |
| Seychelles | 126 |
| Singapore | 200 |
| Switzerland | 200 |
| Territory of Russia as recognised by international law | 109 |
| Trinidad and Tobago | 115 |
| United Arab Emirates | 200 |
| United States of America | 200 |
| Other | 80 |

## D.2 – NATIONAL CONFERENCE COSTS (IN EURO PER DAY)

The amounts depend on the country where the activity takes place.

| Programme Countries | |
|---|---|
| Belgium | 88 |
| Bulgaria | 40 |
| Czech Republic | 55 |
| Denmark | 94 |
| Germany | 90 |
| Estonia | 47 |
| Ireland | 75 |
| Greece | 56 |
| Spain | 70 |
| France | 80 |
| Croatia | 42 |
| Italy | 73 |
| Cyprus | 66 |
| Latvia | 43 |
| Lithuania | 47 |
| Luxembourg | 144 |
| Hungary | 46 |
| Malta | 60 |
| Netherlands | 97 |
| Austria | 94 |
| Poland | 45 |
| Portugal | 55 |
| Romania | 40 |
| Slovenia | 59 |
| Slovakia | 50 |
| Finland | 84 |
| Sweden | 95 |
| United Kingdom | 81 |
| former Yugoslav Republic of Macedonia | 40 |
| Iceland | 69 |
| Liechtenstein | 40 |
| Norway | 138 |
| Turkey | 40 |

| Partner Countries | |
|---|---|
| Argentina | 44 |
| Australia | 90 |
| Bahrain | 43 |
| Barbados | 41 |
| Brunei | 115 |
| Canada | 89 |
| Equatorial Guinea | 57 |
| Hong Kong | 117 |
| Israel | 63 |
| Japan | 78 |
| Korea, Republic of | 67 |
| Kuwait | 110 |
| Macao | 154 |
| New-Zealand | 67 |
| Oman | 57 |
| Qatar | 194 |
| Saudi Arabia | 55 |
| Seychelles | 55 |
| Singapore | 133 |
| Switzerland | 118 |
| Territory of Russia as recognised by international law | 48 |
| Trinidad and Tobago | 50 |
| United Arab Emirates | 107 |
| United States of America | 109 |
| Other | 40 |

## D.3 - SUBSISTENCE: NON-LOCAL SPEAKERS (IN EURO PER DAY)

The amounts depend on the country where the activity takes place.

| Programme Countries | |
|---|---|
| Belgium | 232 |
| Bulgaria | 227 |
| Czech Republic | 230 |
| Denmark | 270 |
| Germany | 208 |
| Estonia | 181 |
| Ireland | 254 |
| Greece | 222 |
| Spain | 212 |
| France | 245 |
| Croatia | 180 |
| Italy | 230 |
| Cyprus | 238 |
| Latvia | 211 |
| Lithuania | 183 |
| Luxembourg | 237 |
| Hungary | 222 |
| Malta | 205 |
| Netherlands | 263 |
| Austria | 225 |
| Poland | 217 |
| Portugal | 204 |
| Romania | 222 |
| Slovenia | 180 |
| Slovakia | 205 |
| Finland | 244 |
| Sweden | 257 |
| United Kingdom | 276 |
| former Yugoslav Republic of Macedonia | 210 |
| Iceland | 245 |
| Liechtenstein | 175 |
| Norway | 220 |
| Turkey | 220 |

| Partner Countries | |
|---|---|
| Afghanistan | 125 |
| Albania | 210 |
| Algeria | 170 |
| Andorra | 195 |
| Angola | 280 |
| Antigua and Barbuda | 225 |
| Argentina | 285 |
| Armenia | 280 |
| Australia | 210 |
| Azerbaijan | 270 |
| Bahamas | 190 |
| Bahrain | 275 |
| Bangladesh | 190 |
| Barbados | 215 |
| Belarus | 225 |
| Belize | 185 |
| Benin | 150 |
| Bhutan | 180 |
| Bolivia | 150 |
| Bosnia and Herzegovina | 200 |
| Botswana | 185 |
| Brazil | 245 |
| Brunei | 225 |
| Burkina Faso | 145 |
| Burundi | 165 |
| Cambodia | 165 |
| Cameroon | 160 |
| Canada | 230 |
| Cape Verde | 125 |
| Central African Republic | 140 |
| Chad | 210 |
| Chile | 245 |
| China | 210 |
| Colombia | 170 |
| Comoros | 135 |
| Congo | 185 |
| Congo (Democratic Republic of the) | 245 |
| Cook Islands | 185 |
| Costa Rica | 190 |
| Cuba | 225 |
| Djibouti | 235 |
| Dominica | 215 |
| Dominican Republic | 230 |
| Ecuador | 190 |
| Egypt | 205 |
| El Salvador | 180 |
| Equatorial Guinea | 145 |
| Eritrea | 130 |
| Ethiopia | 195 |
| Fiji | 170 |
| Gabon | 190 |
| Gambia | 170 |
| Georgia | 295 |
| Ghana | 210 |
| Grenada | 215 |
| Guatemala | 175 |
| Guinea | 185 |
| Guinea-Bissau | 140 |
| Guyana | 210 |
| Haiti | 190 |
| Honduras | 175 |
| Hong Kong | 265 |
| India | 245 |
| Indonesia | 195 |

| | |
|---|---|
| Iran | 200 |
| Iraq | 145 |
| Israel | 315 |
| Republic of Côte d'Ivoire | 190 |
| Jamaica | 230 |
| Japan | 405 |
| Jordan | 195 |
| Kazakhstan | 245 |
| Kenya | 225 |
| Kiribati | 205 |
| Korea, DPR | 230 |
| Korea, Republic of | 300 |
| Kosovo, under UNSC 1244/1999 | 220 |
| Kuwait | 280 |
| Kyrgyzstan | 255 |
| Laos | 195 |
| Lebanon | 260 |
| Lesotho | 150 |
| Liberia | 235 |
| Libya | 225 |
| Macao | 150 |
| Madagascar | 155 |
| Malawi | 215 |
| Malaysia | 250 |
| Maldives | 185 |
| Mali | 155 |
| Marshall Islands | 185 |
| Mauritania | 125 |
| Mauritius | 200 |
| Mexico | 255 |
| Micronesia | 190 |
| Moldova | 250 |
| Monaco | 170 |
| Mongolia | 160 |
| Montenegro | 220 |
| Morocco | 205 |
| Mozambique | 200 |
| Myanmar | 125 |
| Namibia | 135 |
| Nauru | 185 |

| | |
|---|---|
| Nepal | 185 |
| New-Zealand | 185 |
| Nicaragua | 185 |
| Niger | 125 |
| Nigeria | 235 |
| Niue | 185 |
| Oman | 205 |
| Pakistan | 180 |
| Palau | 185 |
| Palestine | 170 |
| Panama | 210 |
| Papua New Guinea | 190 |
| Paraguay | 190 |
| Peru | 210 |
| Philippines | 210 |
| Qatar | 200 |
| Rwanda | 225 |
| Saint Kitts and Nevis | 270 |
| Saint-Lucia | 215 |
| Saint-Vincent and the Grenadines | 265 |
| Samoa | 185 |
| San Marino | 175 |
| Sao Tome and Principe | 155 |
| Saudi Arabia | 280 |
| Senegal | 200 |
| Serbia | 220 |
| Seychelles | 225 |
| Sierra Leone | 190 |
| Singapore | 225 |
| Solomon Islands | 170 |
| Somalia | 175 |
| South Africa | 195 |
| Sri Lanka | 155 |
| Sudan | 270 |
| Suriname | 180 |
| Swaziland | 140 |
| Switzerland | 220 |
| Syria | 225 |
| Tajikistan | 185 |
| Taiwan | 255 |

| | |
|---|---|
| Tanzania | 250 |
| Territory of Russia as recognised by international law | 365 |
| Territory of Ukraine as recognised by international law | 270 |
| Thailand | 205 |
| Timor Leste – Democratic Republic of | 160 |
| Togo | 155 |
| Tonga | 155 |
| Trinidad and Tobago | 175 |
| Tunisia | 145 |
| Turkmenistan | 230 |
| Tuvalu | 185 |
| Uganda | 235 |
| United Arab Emirates | 265 |
| United States of America | 280 |
| Uruguay | 215 |
| Uzbekistan | 230 |
| Vanuatu | 170 |
| Vatican City State | 175 |
| Venezuela | 210 |
| Vietnam | 255 |
| Yemen | 225 |
| Zambia | 185 |
| Zimbabwe | 165 |
| Other | 205 |

# SPORT

## WHICH ACTIONS ARE SUPPORTED?

The following Actions in the field of sport are implemented through this Programme Guide:

- Collaborative Partnerships;
- Small Collaborative Partnerships;
- Not-for-profit European sport events.

In addition, Erasmus+ also supports Actions to strengthen the evidence base for policy making (studies, data gathering, surveys, etc.), to promote the dialogue with relevant European stakeholders (the EU Sport Forum, EU Presidency events, conferences, meetings, seminars, etc.). These Actions will be implemented by the European Commission either directly or through the Executive Agency.

The specific objectives pursued by the Erasmus+ Programme in the field of sport are to:

- tackle cross-border threats to the integrity of sport, such as doping, match fixing and violence, as well as all kinds of intolerance and discrimination;
- promote and support good governance in sport and dual careers of athletes;
- promote voluntary activities in sport, together with social inclusion, equal opportunities and awareness of the importance of health-enhancing physical activity, through increased participation in, and equal access to sport for all.

As provided by the Regulation establishing the Erasmus+ Programme, focus is to be given to grassroots sport.

The Actions in the field of sport are expected to result in the development of the European dimension in sport by generating, sharing and spreading experiences and knowledge about different issues affecting sport at the European level.

Ultimately, sport projects supported through Erasmus+ should lead to increased levels of participation in sport, physical activity and voluntary activity.

More specifically,

- Increased knowledge and awareness regarding sport and physical activity in Programme Countries;
- Increased awareness of as regards the role of sport in promoting social inclusion, equal opportunities and health-enhancing physical activity;
- Strengthened cooperation between institutions and organisations active in the field of sport and physical activity;
- Better participation of sport organisations and other relevant organisations from various Programme Countries in enhanced networks;
- Improved sharing of good practices.

The Actions in the field of sport are expected to contribute to the implementation of the European Week of Sport, which is an initiative launched by the Commission to promote sport and physical activity in the European Union, in the light of declining participation levels.

The European Week of Sport is intended to be organised with the following concept: an official opening, a flagship event, and 5 Focus Days, each day with a different focus theme: education, workplaces, outdoors, sport clubs and fitness centres. Among other activities, the European Week of Sport will encourage the organisation of cross-border awareness raising activities.

As from 2017, the European Week of Sport takes place from 23 to 30 September. Apart from the activities organised by the European Commission, Member States will organise national activities and coordinate local ones.

Further information as regards the 2018 European Week of Sport can be found on http://ec.europa.eu/sport/

# COLLABORATIVE PARTNERSHIPS

## WHAT ARE THE AIMS OF A COLLABORATIVE PARTNERSHIP?

Collaborative Partnerships offer the opportunity to develop, transfer and/or implement innovative outputs and/or engage into intensive dissemination and exploitation activities of existing and newly products or innovative ideas in different areas relating to sport and physical activity. They involve various organisations and actors in and outside sport, including in particular public authorities at local, regional, national and European levels, sport organisations, sport-related organisations and educational bodies. Collaborative Partnerships are, in particular, innovative projects aimed to:

- Encourage participation in sport and physical activity, especially by supporting the implementation of the Council Recommendation on health-enhancing physical activity and being in line with the EU Physical Activity Guidelines;
- Encourage participation in sport and physical activity, especially by supporting the European Week of Sport;
- Promote education in and through sport with special focus on skills development, as well support the implementation of the EU Guidelines Dual Careers of Athletes;
- Promote voluntary activity in sport;
- Combat doping, notably in recreational environments;
- Combat match-fixing;
- Improve good governance in sport;
- Combat violence and tackle racism, discrimination and intolerance in sport;
- Encourage social inclusion and equal opportunities in sport.

In all these areas, gender equality should be promoted. Cooperation with the Partner Countries should be encouraged.

Collaborative Partnerships should promote the creation and development of European networks in the field of sport. The EU can thereby provide opportunities for strengthened cooperation among stakeholders, which would not have existed without EU action. Collaborative Partnerships should also foster synergy with, and between, local, regional, national and international policies to promote sport and physical activity and to address sport-related challenges.

Within the framework of Collaborative Partnerships, Erasmus+ intends to support the testing and development of new project formats and new forms of transnational cooperation in the field of sport that are likely to inspire the development, on a larger scale of initiatives supported with national funding schemes or other European funds, such as the European Structural and Investment Funds.

The Commission, through its Executive Agency, will carry out one selection round over the year.

## WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Erasmus+ offers a large flexibility in terms of activities that Collaborative Partnerships can implement, as long as a proposal demonstrates that these activities are the most appropriate to reach the objectives defined for the project. Collaborative Partnerships may typically cover a broad range of activities, such as for example:

- networking among stakeholders;
- development, identification, promotion and sharing of good practices;
- preparation, development and implementation of educational and training modules and tools;
- activities to increase the competences of multipliers in the field of sport and to develop monitoring and benchmarking of indicators, notably as regards the promotion of ethical behaviours and codes of conduct among sportspeople;
- awareness-raising activities on the added value of sport and physical activity in relation to the personal, social and professional development of individuals;
- activities to promote innovative synergies between the field of sport and the fields of health, education, training and youth;
- activities to improve the evidence-base of sport to tackle societal and economic challenges (collection of data underpinning the aforementioned activities, surveys, consultations, etc.);
- conferences, seminars, meetings, events and awareness-raising actions underpinning the aforementioned activities.

## WHO CAN TAKE PART IN A COLLABORATIVE PARTNERSHIP?

Collaborative Partnerships are open to any type of public institutions or non-profit organisations active in the field of sport and physical activity. Depending on the objective of the project, Collaborative Partnerships should involve an appropriate

and diverse range of partners in order to benefit from different experiences, profiles and expertise and to produce relevant and high quality project results.

Collaborative Partnerships target the cooperation between organisations established in Programme Countries.

A Collaborative Partnership should be composed of:

- applicant/coordinator: organisation that submits the project proposal on behalf of all the partners. When the project is granted, the applicant/coordinator will become the main EU grant beneficiary and will sign a multi-beneficiary grant agreement on behalf of all the participating organisations. Its coordinating role stands for the following duties:
  - represents and acts on behalf of the participating organisations vis-à-vis the European Commission,
  - bears the financial and legal responsibility for the proper operational, administrative and financial implementation of the entire project,
  - coordinates the Collaborative Partnership in cooperation with all other project partners.
- partners: organisations that contribute actively to the preparation, implementation and evaluation of the Collaborative Partnership. Each partner must sign a mandate by which the signatory grants power of attorney to the coordinator to act in his name and for his account during the implementation of the project.

## WHAT ARE THE CRITERIA USED TO ASSESS A COLLABORATIVE PARTNERSHIP?

The list hereafter includes the formal criteria that a Collaborative Project must respect in order to be eligible for an Erasmus+ grant:

### ELIGIBILITY CRITERIA

| | |
|---|---|
| **Eligible participating organisations** | Any non-profit organisation or public body, with its affiliated entities (if any), active in the field of sport, established in a Programme Country or in any Partner Country of the world (see section "Eligible Countries" in Part A of this Guide).<br><br>For example, such organisation can be (non-exhaustive list):<br>▪ a public body in charge of sport at local, regional or national level;<br>▪ a National Olympic Committee or National Sport confederation;<br>▪ a sport organisation at local, regional, national, European or international level;<br>▪ a national sports league;<br>▪ a sport club;<br>▪ an organisation or union representing athletes;<br>▪ an organisation or unions representing professionals and volunteers in sport (such as coaches, managers, etc);<br>▪ an organisation representing the 'sport for all' movement;<br>▪ an organisation active in the field of physical activity promotion;<br>▪ an organisation representing the active leisure sector;<br>▪ an organisation active in the field of education, training or youth. |
| **Who can apply?** | Any participating organisation established in a Programme Country can be the applicant. This organisation applies on behalf of all participating organisations involved in the project. |
| **Number and profile of participating organisations** | A Collaborative Partnership is transnational and involves at least five organisations from five different Programme Countries. There is no maximum number of partners. However, the budget for project management and implementation is capped (and equivalent to 10 partners). All participating organisations must be identified at the time of applying for a grant. |
| **Duration of project** | The duration must be chosen at application stage (12, 18, 24, 30 or 36 months), based on the objective of the project and on the type of activities foreseen over time. |
| **Venue(s) of the activity** | Activities must take place in the countries (one or more) of the organisations involved in the Collaborative Partnership. |

| | |
|---|---|
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **5 April at 12:00 (midday Brussels time)** for projects starting on 1 January of the following year. |
| **How to apply?** | Please see Part C of this Guide for more details on how to apply. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

**AWARD CRITERIA**

The indicative allocation for different categories of collaborative partnerships will be as follows:

- approximately 25% to priorities 1 and 2 (projects supporting the participation in sport and physical activity);
- approximately 25% to priorities 3 and 4 (projects supporting the education in and through sport, with special focus on skills development, as well as implementation of the EU Guidelines on Dual Careers of Athletes[226] and projects supporting voluntary activity in sport);
- approximately 20% to priorities 5, 6 and 7 (projects supporting the integrity of sport such as anti-doping, fight against match-fixing and good governance in sport);
- approximately 30% to the priorities 8 and 9 (projects aiming at combatting violence, racism, discrimination and intolerance in sport, projects aiming at encouraging social inclusion and equal opportunities in sport).

Within these categories, projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives of European policies in the field of sport;<br>- the objectives and the priorities of this Action (see section "What are the aims of a Collaborative Partnership").<br>▪ The extent to which:<br>- the proposal is based on a genuine and adequate needs analysis;<br>- the objectives are clearly defined, realistic and address issues relevant to the participating organisations and target groups;<br>- the proposal is innovative and/or complementary to other initiatives already carried out by the participating organisations;<br>- the proposal brings added value at EU level through results that would not be attained by activities carried out solely in a single country . |
| **Quality of the project design and implementation (max 20 points)** | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, monitoring, evaluation and dissemination;<br>▪ The consistency between project objectives, methodology, activities and budget proposed;<br>▪ The quality and feasibility of the methodology proposed;<br>▪ The existence and quality of management arrangements (timelines, organisation, tasks and responsibilities are well defined and realistic);<br>▪ The existence and relevance of quality control measures to ensure that the project implementation is of high quality, completed in time and on budget;<br>▪ The extent to which the project is cost-effective and allocates appropriate resources to each activity. |

[226] *EU GUIDELINES ON DUAL CAREERS OF ATHLETES* (ADOPTED ON 28.09.2012 BY EU EXPERT GROUP ON EDUCATION AND TRAINING IN SPORT (ISBN 978-92-79-31161-1).

| | |
|---|---|
| **Quality of the project team and the cooperation arrangements (maximum 20 points)** | • The extent to which:<br>- where appropriate, the project involves an appropriate mix of complementary participating organisations with the necessary profile, experience and expertise to successfully deliver all aspects of the project;<br>- the projects includes people with expertise in appropriate fields such as sports policy and practice (training, competitions, coaching, etc.), academic expertise as well as the ability to reach out wider audiences;<br>- the distribution of responsibilities and tasks demonstrates the commitment and active contribution of all participating organisations;<br>- If applicable, the extent to which the involvement of a participating organisation from a Partner Country brings an essential added value to the project. |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the project;<br>▪ The potential impact of the project:<br>- on participants and participating organisations, during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at local, regional, national and/or European levels.<br>▪ The quality of the dissemination plan: the appropriateness and quality of measures aimed at sharing the outcomes of the project within and outside the participating organisations;<br>▪ If relevant, the extent to which the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limitations;<br>▪ The quality of the plans for ensuring the sustainability of the project: its capacity to continue having an impact and producing results after the EU grant has been used up. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 15 points for the categories "relevance of the project" and "impact and dissemination"; 10 points for the categories "quality of the project design and implementation" and "quality of the project team and the cooperation arrangements".

## WHAT ARE THE FUNDING RULES?

The budget of the project must be drafted according to the following funding rules (in euro):

<table>
<tr><th colspan="6">Maximum grant awarded for Collaborative Partnerships: 400 000 EUR</th></tr>
<tr><th colspan="2">Eligible costs</th><th>Financing mechanism</th><th colspan="2">Amount</th><th>Rule of allocation</th></tr>
<tr><td rowspan="2">Project management and implementation</td><td rowspan="2">Project management (e.g. planning, finances, coordination and communication between partners, etc.); small scale learning/teaching/training materials, tools, approaches etc. Virtual cooperation and local project activities; information, promotion and dissemination (e.g. brochures, leaflets, web information, etc.).</td><td>Contribution to unit costs</td><td>Contribution to the activities of the coordinating organisation:<br>500 EUR per month</td><td rowspan="2">Maximum 2.750 EUR per month</td><td rowspan="2">Based on the duration of the Collaborative Partnerships and on the number of participating organisations involved</td></tr>
<tr><td>Contribution to unit costs</td><td>Contribution to the activities of the other participating organisations:<br>250 EUR per organisation per month</td></tr>
<tr><td>Transnational project meetings</td><td>Participation in meetings between project partners and hosted by one of the participating organisations for implementation and coordination purposes. Contribution to travel and subsistence costs</td><td>Contribution to unit costs</td><td colspan="2">For travel distances between 100 and 1999KM:<br>575 EUR per participant per meeting<br><br>For travel distances of 2000 KM or more:<br>760 EUR per participant per meeting</td><td>Conditional: applicants must justify the need for the meetings in terms of number of meetings and participants involved. Travel distances must be calculated using the distance calculator supported by the European Commission.</td></tr>
<tr><th colspan="2">Eligible costs</th><th>Financing mechanism</th><th colspan="2">Amount</th><th>Rule of allocation</th></tr>
<tr><td>Exceptional costs</td><td>Contribution to real costs related to subcontracting or purchase of goods and services.<br>Costs for providing a financial guarantee, if the Executive Agency asks for it.</td><td>Real costs</td><td colspan="2">80% of eligible costs<br>Maximum of 50.000 EUR per project (excluding costs for providing a financial guarantee)</td><td>Conditional: subcontracting has to be related to services that cannot be provided directly by the participating organisations for duly justified reasons. Equipment cannot concern normal office equipment or equipment normally used by the</td></tr>
</table>

| | | | | |
|---|---|---|---|---|
| | | | | participating organisations. |

| **Additional funding for Large Collaborative Partnerships** | | | | | |
|---|---|---|---|---|---|
| Intellectual outputs | Intellectual outputs/tangible deliverables of the project (such as guidelines, pedagogical materials, open educational resources (OER), IT tools, analyses, studies, peer-learning methods, surveys and reports, inventions – e.g. : new sport games, etc.) | Contribution to unit costs | B5.1 per manager per day of work on the project | | Conditional: staff costs for managers and administrative staff are expected to be covered already under "Project management and implementation". To prevent potential overlap with such item, applicants will have to justify the type and volume of staff costs applied for in relation to each output proposed.<br>The outputs should be substantial in quality and quantity to qualify for this type of grant support. The outputs should prove their potential for wider use and exploitation, as well as for impact. |
| | | | B5.2 per researcher/teacher/coach/trainer/youth worker per day of work on the project | | |
| | | | B5.3 per technician per day of work on the project | | |
| | | | B5.4 per administrative staff per day of work on the project | | |
| Multiplier sport events | Contribution to the costs linked to national and transnational conferences, seminars, events sharing and disseminating the intellectual outputs realised by the project (excluding costs for travel and subsistence of representatives of participating organisations involved in the project). | Contribution to unit costs | 100 EUR per local participant<br>(i.e. participants from the country where the event is taking place) | Maximum 30.000 EUR per project | Conditional: support for multiplier events is provided only if in direct relation to the intellectual outputs of the project. A project without grant support for intellectual outputs cannot receive support for organising multiplier events. |
| | | | 200 EUR per international participant (i.e. participants from other countries) | | |

### TABLE A – INTELLECTUAL OUTPUTS (AMOUNTS IN EURO PER DAY)

This funding can only be used for staff costs of organisations participating in the project for the production of Intellectual outputs. The amounts depend on: a) profile of staff engaged in the project and b) the country of the participating organisation whose staff is engaged.

| | Manager | Teacher/Trainer/Researcher/ Youth worker | Technician | Administrative staff |
|---|---|---|---|---|
| | B5.1 | B5.2 | B5.3 | B5.4 |
| **Denmark, Ireland, Luxembourg, Netherlands, Austria, Sweden, Liechtenstein, Norway** | 294 | 241 | 190 | 157 |
| **Belgium, Germany, France, Italy, Finland, United Kingdom, Iceland** | 280 | 214 | 162 | 131 |
| **Czech Republic, Greece, Spain, Cyprus, Malta, Portugal, Slovenia** | 164 | 137 | 102 | 78 |
| **Bulgaria, Estonia, Croatia, Latvia, Lithuania, Hungary, Poland, Romania, Slovakia, former Yugoslav Republic of Macedonia, Turkey** | 88 | 74 | 55 | 39 |

## TABLE B – INTELLECTUAL OUTPUTS (AMOUNTS IN EURO PER DAY)

This funding can only be used for staff costs of organisations participating in the project for the production of Intellectual outputs. The amounts depend on: a) profile of staff engaged in the project and b) the country of the participating organisation whose staff is engaged.

| | Manager | Teacher/Trainer/Researcher/ Youth worker | Technician | Administrative staff |
|---|---|---|---|---|
| | B5.1 | B5.2 | B5.3 | B5.4 |
| **Australia, Canada, Kuwait, Macao, Monaco, Qatar, San Marino, Switzerland, United States of America** | 294 | 241 | 190 | 157 |
| **Andorra, Brunei, Japan, New Zealand, Singapore, United Arab Emirates, Vatican City State** | 280 | 214 | 162 | 131 |
| **Bahamas, Bahrain, Hong Kong, Israel, Korea (Republic of), Oman, Saudi Arabia, Taiwan** | 164 | 137 | 102 | 78 |
| **Afghanistan, Albania, Algeria, Angola, Antigua and Barbuda, Argentina, Armenia, Azerbaijan, Bangladesh, Barbados, Belarus, Belize, Benin, Bhutan, Bolivia, Bosnia and Herzegovina, Botswana, Brazil, Burkina Faso, Burundi, Cambodia, Cameroon, Cape Verde, Central African Republic, Chad, Chile, China, Colombia, Comoros, Congo, Congo – Democratic Republic of the, Cook Islands, Costa Rica, Cuba, Djibouti, Dominica, Dominican Republic, Ecuador, Egypt, El Salvador, Equatorial Guinea, Eritrea, Ethiopia, Fiji, Gabon, Gambia, Georgia, Ghana, Grenada, Guatemala, Guinea, Guinea-Bissau, Guyana, Haiti, Honduras, India, Indonesia, Iran, Iraq, Republic of Côte d'Ivoire, Jamaica, Jordan, Kazakhstan, Kenya, Kiribati, Korea (DPR), Kosovo, Kyrgyzstan, Laos, Lebanon, Lesotho, Liberia, Libya, Madagascar, Malawi, Malaysia, Maldives, Mali, Marshall Islands, Mauritania, Mauritius, Mexico, Micronesia – Federated States of, Moldova, Mongolia, Montenegro, Morocco, Mozambique, Myanmar, Namibia, Nauru, Nepal, Nicaragua, Niger, Nigeria, Niue, Pakistan, Palau, Palestine, Panama, Papua New Guinea, Paraguay, Peru, Philippines, Rwanda, Saint Kitts And Nevis, Saint Lucia, Saint Vincent And The Grenadines, Samoa, Sao Tome and Principe, Senegal, Serbia, Seychelles, Sierra Leone, Solomon Islands, Somalia, South Africa, South Sudan, Sri Lanka, Sudan, Suriname, Swaziland, Syria, Tajikistan, Tanzania, Territory of Russia as recognised by international law, Territory of Ukraine as recognised by international law, Thailand, Timor Lest – Democratic Republic of Togo, Tonga, Trinidad and Tobago, Tunisia, Turkmenistan, Tuvalu, Uganda, Uruguay, Uzbekistan, Vanuatu, Venezuela, Vietnam, Yemen, Zambia, Zimbabwe** | 88 | 74 | 55 | 39 |

# SMALL COLLABORATIVE PARTNERSHIPS

## WHAT ARE THE AIMS OF A SMALL COLLABORATIVE PARTNERSHIP?

Small Collaborative Partnerships will allow organisations to develop and reinforce networks, increase their capacity to operate at transnational level, exchange good practices, confront ideas and methods in different areas relating to sport and physical activity. Selected projects may also produce tangible outputs and are expected to disseminate the results of their activities, although in a way that is proportional to the aim and scope of the project. Small Collaborative partnerships involve various organisations including in particular public authorities at local, regional and national levels, sport organisations, sport-related organisations and educational bodies. Small Collaborative Partnerships will in particular aim at ensuring the continuity of Preparatory actions 2013 and are, in particular, projects aimed to:

- Encourage social inclusion and equal opportunities in sport;
- Promote European traditional sports and games;
- Support the mobility of volunteers, coaches, managers and staff of non-profit sport organisations;
- Protect athletes, especially the youngest, from health and safety hazards by improving training and competition conditions;
- Promote education in and through sport with special focus on skills development.

Small Collaborative Partnerships should promote the creation and development of transnational networks in the field of sport. The EU can thereby provide opportunities for strengthened cooperation among stakeholders, which would not have existed without EU action. Small Collaborative Partnerships should also foster synergy with, and between, local, regional, national and international policies to promote sport and physical activity and to address sport-related challenges.

Small Collaborative Partnerships should include at least one local or regional sport club.

The Commission, through its Executive Agency, will carry one selection round over the year.

## WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Erasmus+ offers a large flexibility in terms of activities that Small Collaborative Partnerships can implement, as long as a proposal demonstrates that these activities are the most appropriate to reach the objectives defined for the project. Small Collaborative Partnerships may typically cover a broad range of activities, such as for example:

- networking among stakeholders;
- promotion, identification and sharing of good practices;
- preparation, development and implementation of educational and training modules and tools;
- awareness-raising activities on the added value of sport and physical activity in relation to the personal, social and professional development of individuals;
- activities to promote innovative synergies between the field of sport and the fields of health, education, training and youth;
- activities to improve the evidence-base of sport to tackle societal and economic challenges (collection of data underpinning the aforementioned activities, surveys, consultations, etc.);
- conferences, seminars, meetings, events and awareness-raising actions underpinning the aforementioned activities.

## WHO CAN TAKE PART IN A SMALL COLLABORATIVE PARTNERSHIP?

Small Collaborative Partnerships are open to any type of public institutions or non-profit organisations active in the field of sport and physical activity. Depending on the objective of the project, Small Collaborative Partnerships should involve an appropriate and diverse range of partners in order to benefit from different experiences, profiles and expertise and to produce relevant and quality project results.

Small Collaborative Partnerships target the cooperation between organisations established in Programme Countries.

A Small Collaborative Partnership should be composed of:

- applicant/coordinator: organisation that submits the project proposal on behalf of all the partners. When the project is granted, the applicant/coordinator will become the main EU grant beneficiary and will sign a beneficiary grant agreement. Please consult Part C of this Guide for more information on financial and contractual arrangements. Its coordinating role stands for the following duties:

- represents and acts on behalf of the participating organisations vis-à-vis the European Commission;
- bears the financial and legal responsibility for the proper operational, administrative and financial implementation of the entire project;
- coordinates the Collaborative Partnership in cooperation with all other project partners;
- receives the EU financial support from the Erasmus+ Programme and is responsible for distributing the funds among partners involved in the project.

- partners: organisations that contribute to the preparation, implementation and evaluation of the Small Collaborative Partnership.

## WHAT ARE THE CRITERIA USED TO ASSESS A SMALL COLLABORATIVE PARTNERSHIP?

The list hereafter includes the formal criteria that a Small Collaborative Project must respect in order to be eligible for an Erasmus+ grant:

### ELIGIBILITY CRITERIA

| | |
|---|---|
| **Eligible participating organisations** | Any non-profit organisation or public body, with its affiliated entities (if any), active in the field of sport, established in a Programme Country or in any Partner Country of the world (see section "Eligible Countries" in Part A of this Guide).<br><br>For example, such organisation can be (non-exhaustive list):<br>▪ a public body in charge of sport at local, regional or national level;<br>▪ a National Olympic Committee or National Sport confederation;<br>▪ a sport organisation at local, regional or national, level;<br>▪ a national sports league;<br>▪ a sport club;<br>▪ an organisation or union representing athletes;<br>▪ an organisation or unions representing professionals and volunteers in sport (such as coaches, managers, etc);<br>▪ an organisation representing the 'sport for all' movement;<br>▪ an organisation active in the field of physical activity promotion;<br>▪ an organisation representing the active leisure sector; |
| **Who can apply?** | Any participating organisation established in a Programme Country can be the applicant. This organisation applies on behalf of all participating organisations involved in the project. |
| **Number and profile of participating organisations** | A Small Collaborative Partnership is transnational and involves at least three organisations from three different Programme Countries. There is no maximum number of partners. However, the budget for project management and implementation is capped (and equivalent to 5 partners). All participating organisations must be identified at the time of applying for a grant. |
| **Duration of project** | From 12 to 24 months. The duration must be chosen at application stage (12, 18 or 24 months), based on the objective of the project and on the type of activities foreseen over time. |
| **Venue(s) of the activity** | Activities must take place in the countries (one or more) of the organisations involved in the Small Collaborative Partnership. |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **5 April at 12:00 (midday Brussels time**) for projects starting on 1 January of the following year. |
| **How to apply?** | Please see Part C of this Guide for more details on how to apply. |

Applicant organisations will be assessed against the relevant exclusion and selection criteria. For more information please consult Part C of this Guide.

**AWARD CRITERIA**

Within these categories, projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives of European policies in the field of sport;<br>- the objectives and the priorities of this Action (see section "What are the aims of a Collaborative Partnership").<br>▪ The extent to which:<br>- the proposal is based on a genuine and adequate needs analysis;<br>- the objectives are clearly defined, realistic and address issues relevant to the participating organisations and target groups;<br>- the proposal is innovative and/or complementary to other initiatives already carried out by the participating organisations;<br>- the proposal brings added value at EU level through results that would not be attained by activities carried out solely in a single country . |
| **Quality of the project design and implementation (max 20 points)** | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, monitoring, evaluation and dissemination;<br>▪ The consistency between project objectives, methodology, activities and budget proposed;<br>▪ The quality and feasibility of the methodology proposed;<br>▪ The existence and quality of management arrangements (timelines, organisation, tasks and responsibilities are well defined and realistic);<br>▪ The existence and relevance of quality control measures to ensure that the project implementation is of high quality, completed in time and on budget;<br>▪ The extent to which the project is cost-effective and allocates appropriate resources to each activity. |
| **Quality of the project team and the cooperation arrangements (maximum 20 points)** | • The extent to which:<br>- where appropriate, the project involves an appropriate mix of complementary participating organisations with the necessary profile, experience and expertise to successfully deliver all aspects of the project;<br>- the projects includes people with expertise in appropriate fields such as sports policy and practice (training, competitions, coaching, etc.), academic expertise as well as the ability to reach out wider audiences;<br>- the distribution of responsibilities and tasks demonstrates the commitment and active contribution of all participating organisations;<br>- If applicable, the extent to which the involvement of a participating organisation from a Partner Country brings an essential added value to the project. |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the project;<br>▪ The potential impact of the project:<br>- on participants and participating organisations, during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at local, regional, national and/or European levels.<br>▪ The quality of the dissemination plan: the appropriateness and quality of measures aimed at sharing the outcomes of the project within and outside the participating organisations;<br>▪ If relevant, the extent to which the proposal describes how the materials, documents and media produced will be made freely available and promoted through open licences, and does not contain disproportionate limita- |

| | |
|---|---|
| | tions;<br>▪ The quality of the plans for ensuring the sustainability of the project: its capacity to continue having an impact and producing results after the EU grant has been used up. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 15 points for the categories "relevance of the project" and "impact and dissemination"; 10 points for the categories "quality of the project design and implementation" and "quality of the project team and the cooperation arrangements").

## WHAT ARE THE FUNDING RULES?

The budget of the project must be drafted according to the following funding rules (in euro):

<table>
<tr><th colspan="6">Maximum grant awarded for Small Collaborative Partnerships: 60 000 EUR</th></tr>
<tr><th colspan="2">Eligible costs</th><th>Financing mechanism</th><th colspan="2">Amount</th><th>Rule of allocation</th></tr>
<tr><td rowspan="2">Project management and implementation</td><td rowspan="2">Project management (e.g. planning, finances, coordination and communication between partners, etc.); small scale learning/teaching/training materials, tools, approaches etc. Virtual cooperation and local project activities; information, promotion and dissemination (e.g. brochures, leaflets, web information, etc.).</td><td>Contribution to unit costs</td><td>Contribution to the activities of the coordinating organisation:<br>500 EUR per month</td><td rowspan="2">Maximum 1.500 EUR per month</td><td rowspan="2">Based on the duration of the Small Collaborative Partnerships and on the number of participating organisations involved</td></tr>
<tr><td>Contribution to unit costs</td><td>Contribution to the activities of the other participating organisations:<br>250 EUR per organisation per month</td></tr>
<tr><td>Transnational project meetings</td><td>Participation in meetings between project partners and hosted by one of the participating organisations for implementation and coordination purposes. Contribution to travel and subsistence costs</td><td>Contribution to unit costs</td><td colspan="2">For travel distances between 100 and 1999KM:<br>575 EUR per participant per meeting<br><br>For travel distances of 2000 KM or more:<br>760 EUR per participant per meeting</td><td>Conditional: applicants must justify the need for the meetings in terms of number of meetings and participants involved. Travel distances must be calculated using the distance calculator supported by the European Commission.</td></tr>
<tr><th colspan="2">Eligible costs</th><th>Financing mechanism</th><th colspan="2">Amount</th><th>Rule of allocation</th></tr>
<tr><td>Exceptional costs</td><td>Contribution to real costs related to subcontracting or purchase of goods and services.<br>Costs for providing a financial guarantee, if the Executive Agency asks for it.</td><td>Real costs</td><td colspan="2">80% of eligible costs<br>Maximum of 10.000 EUR per project (excluding costs for providing a financial guarantee)</td><td>Conditional: subcontracting has to be related to services that cannot be provided directly by the participating organisations for duly justified reasons. Equipment cannot concern normal office equipment or equipment normally used by the participating organisations.</td></tr>
</table>

# NOT-FOR-PROFIT EUROPEAN SPORT EVENTS

## WHAT ARE THE AIMS OF A NOT-FOR-PROFIT EUROPEAN SPORT EVENT?

This Action is aimed to support:

- Volunteering in sport;
- Social inclusion through sport;
- Gender equality in sport;
- Health-Enhancing Physical Activity;
- Implementation of the European Week of Sport.

The Commission, through its Executive Agency, will carry out one selection round over the year.

Within the not-for-profit European sport events, the indicative allocation for different categories will be as follows:

- approximately 30% for events to implement the European Week of Sport;
- approximately 70% for events not linked to the European Week of Sport (e.g. relating to volunteering in sport, social inclusion through sport, gender equality in sport, health-enhancing physical activity).

Approximately 4 events should be selected for the implementation of the European Week of Sport. They should focus on the themes identified for the implementation of the European Week of Sport (namely: education, workplace, outdoors, sport clubs and fitness centres).

Approximately 8 events not linked to the European Week of Sport should be selected. In relation to the above topics (i.e. volunteering, social inclusion, gender, HEPA), at least one event should focus on the external dimension of sport (e.g. sport diplomacy) and at least one event should focus on the role of grassroots sport in supporting the objectives of this action (volunteering in sport, social inclusion in and through sport, gender equality in sport, health-enhancing physical activity).

For all the events, gender equality should be promoted. Cooperation with the Partner Countries should be encouraged.

## WHAT IS A NOT-FOR-PROFIT EUROPEAN SPORT EVENT?

This Action provides financial support for:
- the organisation of European-wide sport events organised in one Programme Country;
- national events - organised simultaneously in several Programme Countries by not-for-profit organisations or public bodies active in the field of sport.

The expected results of these events are:

- increased awareness as regards the role of sport in promoting social inclusion, equal opportunities and health-enhancing physical activity;
- increased participation in sport, physical activity and voluntary activity.

## WHICH ACTIVITIES ARE SUPPORTED UNDER THIS ACTION?

Support for events will imply assigning EU grants to individual organisations in charge of the preparation, organisation and follow-up to a given event. The following standard activities will be supported under this Action (non-exhaustive list):

- preparation of the event;
- organisation of educational activities for athletes, coaches, organisers and volunteers in the run-up to the event;
- organisation of the event;
- organisation of side-activities to the sporting event (conferences, seminars);
- implementation of legacy activities (evaluations, drafting of future plans);
- communication activities linked to the topic of the event.

## WHICH ACTIVITIES ARE NOT ELIGIBLE UNDER THIS ACTION?

- Sport competitions organised by international, European or national sport federations/leagues on a regular basis;
- Professional sport competitions.

## WHAT ARE THE CRITERIA USED TO ASSESS A NOT-FOR-PROFIT EUROPEAN SPORT EVENT?

The list hereafter includes the formal criteria that a not-for-profit European sport event must respect in order to be eligible for an Erasmus+ grant:

## ELIGIBILITY CRITERIA

| | |
|---|---|
| **Who can apply?** | Any public body or non-profit organisation, with its affiliated entities (if any), active in the field of sport, established in a Programme Country. For example, such organisation can be (non-exhaustive list):<br>▪ a public body in charge of sport at local, regional or national level;<br>▪ a sport organisation at local, regional, national, European or international level;<br>▪ the coordinator of a national event organised in the framework of a European event in the field of sport. |
| **Eligible events and participants** | European-wide sport events organised in one country must involve participants to the event from at least 12 different Programme Countries.<br>OR<br>Sport events organised simultaneously in several Programme Countries must involve participants to the events from at least 12 different Programme Countries. This condition is fulfilled as long as these participants are involved in the sum of events in total.<br>All participating organisations must be identified at the time of applying for a grant. |
| **Duration of project** | Up to 1 year (from preparation of the event to its follow-up). |
| **Dates of the event** | The event must take place during the following year (any time till 31 October). |
| **Where to apply?** | To the Education, Audiovisual and Culture Executive Agency, located in Brussels. |
| **When to apply?** | Applicants have to submit their grant application by **5 April at 12:00 (midday Brussels time)** for projects starting on 1 November of the same year. |
| **How to apply?** | Please see Part C of this Guide for more details on how to apply. |

Applicant organisations will be assessed against the relevant **exclusion and selection criteria**. For more information please consult Part C of this Guide.

## AWARD CRITERIA

Projects will be assessed against the following criteria:

| | |
|---|---|
| **Relevance of the project (maximum 30 points)** | ▪ The relevance of the proposal to:<br>- the objectives of European policies in the field of sport;<br>- the objectives and the priorities of this Action (see section "What are the aims of a not-for-profit European Sport event?" ).<br>▪ The extent to which:<br>- the proposal is based on a genuine and adequate needs analysis;<br>- the objectives are clearly defined, realistic and address issues relevant to the participating organisations and target groups;<br>- the proposal is innovative and/or complementary to other initiatives already carried out by the participating organisations;<br>- the proposal brings added value at EU level through results that would not be attained by activities carried out solely in a single country . |

| | |
|---|---|
| **Quality of the project design and implementation (maximum 40 points)** | ▪ The clarity, completeness and quality of the work programme, including appropriate phases for preparation, implementation, monitoring, evaluation and dissemination;<br>▪ The consistency between project objectives, methodology, activities and budget proposed;<br>▪ The quality and feasibility of the methodology proposed;<br>▪ The extent to which the project includes people with expertise in different areas such as sports practice (training, competitions, coaching, etc.);<br>▪ The existence and quality of management arrangements (timelines, organisation, tasks and responsibilities are well defined and realistic);<br>▪ The existence and relevance of quality control measures to ensure that the project implementation is of high quality, completed in time and on budget;<br>▪ The extent to which the project is cost-effective and allocates appropriate resources to each activity. |
| **Impact and dissemination (maximum 30 points)** | ▪ The quality of measures for evaluating the outcomes of the project;<br>▪ The potential impact of the project:<br>- on participants and participating organisations, during and after the project lifetime;<br>- outside the organisations and individuals directly participating in the project, at local, regional, national and/or European levels.<br>▪ The quality of the dissemination plan: the appropriateness and quality of measures aimed at sharing the outcomes of the project within and outside the participating organisations;<br>▪ The quality of measures to ensure visibility and media coverage of the event and of the EU support. |

To be considered for funding, proposals must score at least 60 points. Furthermore, they must score at least half of the maximum points in each of the categories of award criteria mentioned above (i.e. minimum 15 points for the categories "relevance of the project" and "impact and dissemination"; 20 points for the category "quality of the project design and implementation").

## WHAT ARE THE FUNDING RULES?

The budget of the project must be drafted according to the following funding rules (in euro):

| Eligible costs | | Financing mechanism | Amount | Rule of allocation |
|---|---|---|---|---|
| **Activity costs** | Costs directly linked to the implementation of the complementary activities of the project, including:<br><br>Eligible direct costs:<br>▪ Personnel<br>▪ Travel and subsistence<br>▪ Equipment<br>▪ Consumables and supplies<br>▪ Subcontracting<br>▪ Duties, taxes and charges<br>▪ Other costs<br><br>Indirect costs:<br>A flat-rate amount, not exceeding 7% of the eligible direct costs of the project, is eligible under indirect costs, representing the beneficiary's general administrative costs which can be regarded as chargeable to the project (e.g. electricity or internet bills, costs for premises, cost of permanent staff, etc.) | Real costs | Maximum grant awarded:<br>• For not-for-profit European sport events organised during the European Week of Sport: **300,000 EUR**<br><br>• For not-for-profit European sport events not related to the European Week of Sport: **500,000 EUR**<br><br>Maximum 80% of the total eligible costs. | Conditional: the budget requested is justified in relation to the planned activities. |

# PART C - INFORMATION FOR APPLICANTS

All those organisations (including informal groups) who intend to submit a project proposal in order to receive financial support from the EU under the Erasmus+ Programme are invited to read carefully this section which is drafted in accordance with the provisions of the Financial Regulation[227] applicable to the general budget of the European Union (hereafter defined "EU Financial Regulation") and with its rules of application.

Individuals are not entitled to submit project proposals in the framework of the Erasmus+ Programme, except for individuals applying on behalf of a group of (at least four) young people active in youth work but not necessarily in the context of a youth organisation (hereafter defined "informal group of young people").

## WHAT TO DO IN ORDER TO SUBMIT AN ERASMUS+ APPLICATION?

To submit an Erasmus+ project, applicants must follow the four steps described below:

- Each organisation involved in the application must register in the Participant Portal and receive a Participant Identification Code (PIC). Organisations/groups that have already obtained a PIC through their participation in other EU programmes do not need to register again. The PIC obtained from this previous registration is valid also for applying under Erasmus+;
- check the compliance with the Programme criteria for the relevant Action/field;
- check the financial conditions;
- fill in and submit the application form.

### STEP 1: REGISTER IN THE PARTICIPANT PORTAL

All organisations involved in the application must be registered and provide their basic legal and financial data in the Education, Audiovisual, Culture, Citizenship and Volunteering Participant Portal, if not already done.

To register in the Participant Portal, the person representing an organisation (or an informal group of young people) must carry out the following steps:

- Create an ECAS account (unless the person representing the organisation/group already has an account). New ECAS accounts can be created via the following website: https://webgate.ec.europa.eu/cas/eim/external/register.cgi;

- Access the Participant Portal at http://ec.europa.eu/education/participants/portal/desktop/en/organisations/register.html and register on behalf of the organisation/group. Guidance and Frequently Asked Questions are available on the Participant Portal.

The organisation/group need to register only once in the Participant Portal. Once the registration is completed, the organisation/group will obtain a Participant Identification Code (PIC). The PIC, which is a unique identifier and is necessary for the submission of applications, enables the organisation/group to fill-in the Erasmus+ electronic application forms in a simpler manner (i.e. by inserting the PIC number in the form, all the information provided by the organisation/group at registration stage will be automatically displayed in the form).

#### PROOF OF LEGAL STATUS AND FINANCIAL CAPACITY

At the time of the registration, organisations must also upload the following documents in the Participant Portal:

- the Legal Entity form (this form can be downloaded from the European Commission's website at: http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm);

[227] The EU Financial Regulation can be found at:
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2012:298:0001:0096:EN:PDF

- the Financial Identification form. Please fill in the form relating to the country in which the bank is located, even if the applicant organisation is officially registered in another country (this form can be downloaded at: http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm).

For grants exceeding 60 000 EUR, applicants may need to upload specific documents to give proof of their financial capacity. For more details, see the section "Selection Criteria" below.

The Financial Identification form should be provided only for the applicant organisation, but is not required for the partner organisations.

## STEP 2: CHECK THE COMPLIANCE WITH THE PROGRAMME CRITERIA

When developing their project and before applying for EU support, participating organisations must verify that the project respects the following criteria: eligibility, exclusion, selection and award.

### ELIGIBILITY CRITERIA

The eligibility criteria mainly relate to the type of project and activities (including, where relevant, duration, participating organisations, etc.), the target group (e.g. status and number of participants involved) and the conditions for submitting a grant request for such a project (e.g. deadlines for submission, completeness of the application form, etc.).

To be eligible, the project must meet all the eligibility criteria relating to the Action under which the proposal is submitted. If the project does not meet these criteria at application stage, it will be rejected without being further evaluated. As an exception, in case of mobility activities and EMJMD Scholarships supported under Key Action 1 or Key Action 2, some eligibility criteria (e.g. duration, profile of participants, etc.) may only be verified during the stage of project implementation or at final report stage (not at application stage). At application stage, the applicants will be asked to declare that these criteria will be met by the project. However, if it appears at implementation or final report stage that these criteria have not been fulfilled, the participants or the activity may be considered ineligible with a consequent reduction/recovery of the EU grant initially awarded to the project.

The specific eligibility criteria applying to each of the Actions implemented through the Erasmus+ Programme Guide are described in Part B of the Guide.

### EXCLUSION CRITERIA

An applicant will be excluded from participating in calls for proposals under the Erasmus+ Programme or will be rejected from the award procedure if it is found in one of the situations described below, in accordance with articles 106 and/or 107 of Eu Financial Regulation:

a) the applicant is bankrupt, subject to insolvency or winding up procedures, its assets are being administered by a liquidator or by a court, it is in an arrangement with creditors, its business activities are suspended or it is in any analogous situation arising from a similar procedure provided for under national legislation or regulations;

b) a final judgement or a final administrative decision has established that the applicant is in breach of its obligations relating to the payment of taxes or social security contributions in accordance with the law of the country in which it is established, with those of the country in which the authorising officer is located or those of the country of the implementation of the grant;

c) a final judgement or a final administrative decision has established that the applicant is guilty of grave professional misconduct by having violated applicable laws or regulations or ethical standards of the profession to which the applicant belongs, or by having engaged in any wrongful conduct which has an impact on its professional credibity where such conduct denotes wrongful intent or gross negligence, including, in particular, any of the following:

(i) fraudulently or negligently misrepresenting information required for the verification of the absence of grounds for exclusion or the fulfilment of selection criteria or in the performance of a contract, a grant agreement or a grant decision;

(ii) entering into agreement with other persons with the aim of distorting competition;

(iii) violating intellectual property rights;

(iv) attempting to influence the decision-making process of the Commission/Agency during the award procedure;

(v) attempting to obtain confidential information that may confer upon it undue advantages in the award procedure;

d) a final judgement has established that the applicant is guilty of any of the following:

(i) fraud, within the meaning of Article 1 of the Convention on the protection of the European Communities' financial interests, drawn up by the Council Act of 26 July 1995;

(ii) corruption, as defined in Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of EU Member States, drawn up by the Council Act of 26 May 1997, and in Article 2(1) of Council Framework Decision 2003/568/JHA, as well as corruption as defined in the legal provisions of the country where the authorising officer is located, the country in which the applicant is established or the country of the implementation of the grant;

(iii) participation in a criminal organisation, as defined in Article 2 of Council Framework Decision 2008/841/JHA;

iv) money laundering or terrorist financing, as defined in Article 1 of Directive 2005/60/EC of the European Parliament and of the Council;

(v) terrorist-related offences or offences linked to terrorist activities, as defined in Articles 1 and 3 of Council Framework Decision 2002/475/JHA, respectively, or inciting, aiding, abetting or attempting to commit such offences, as referred to in Article 4 of that Decision;

(vi) child labour or other forms of trafficking in human beings as defined in Article 2 of Directive 2011/36/EU of the European Parliament and of the Council;

e) the applicant has shown significant deficiencies in complying with the main obligations in the performance of a contract, a grant agreement or a grant decision financed by the Union's budget, which has led to its early termination or to the application of liquidated damages or other contractual penalties, or which has been discovered following checks, audits or investigations by an Authorising Officer, OLAF or the Court of Auditors;

f) a final judgment or final administrative decision has established that the applicant has committed an irregularity within the meaning of Article 1(2) of Council Regulation (EC, Euratom) No 2988/95;

g) in the absence of a final judgement or where applicable a final administrative decision, the applicant is in one of the cases provided in (c) to (f) above based in particular on :

i. facts established in the context of audits or investigations carried out by the Court of Auditors, OLAF or internal audit, or any other check, audit or control performed under the responsibility of an authorising officer of an EU institution, of a European office or of an EU agency or body;

ii. non-final administrative decisions which may include disciplinary measures taken by the competent supervisory body responsible for the verification of the application of standards of professional ethics;

iii. decisions of the ECB, the EIB, the European Investment Fund or international organisations;

iv. decisions of the Commission relating to the infringement of the Union's competition rules or of a national competent authority relating to the infringement of Union or national competition law.

v. decisions of exclusion by an authorising officer of an EU institution, of a European office or of an EU agency or body.

(h) where a person who is a member of the administrative, management or supervisory body of the applicant, or who has powers of representation, decision or control with regard to that applicant (this covers the company directors, members of the management or supervisory bodies, and cases where one person holds a majority of shares), is in one or more of the situations referred to in points (c) to (f) above.

(i) where a natural or legal person that assumes unlimited liability for the debts of that applicant is in one or more of the situations referred to in point (a) or (b) above.

If an applicant is in one of the situations of exclusion listed above, it should indicate the measures it has taken to remedy the exclusion situation, thus demonstrating its reliability. They may include e.g. technical, organisational and personnel measures to prevent further occurrence, compensation of damage or payment of fines. This does not apply for the situations referred in point (d) of this section.

In the cases provided in (c) to (f) above, in the absence of a final judgement or where applicable a final administrative decision, the National or Executive Agency may exclude an applicant provisionally from participating in a call for proposals where their participation would constitute a serious and imminent threat to the Union's financial interests.

If the action for which the applicant has submitted its proposal foresees particular provisions for the participation of affiliated entities, the same exclusion criteria apply to affiliated entities.

Rejection from this procedure and administrative sanctions (exclusion or financial penalty) may be imposed on applicants or affiliated entities where applicable, if any of the declarations or information provided as a condition for participating in this procedure prove to be false.

The National or Executive Agency may publish on its internet site the following information related to the exclusion and, where applicable, the financial penalty in the cases referred to in points (c), (d), (e) and (f) of the section above:

(a) the name of the applicant concerned;

(b) the exclusion situation;

(c) the duration of the exclusion and/or the amount of the financial penalty.

These exclusion criteria apply to applicants under all Actions of the Erasmus+ Programme. To certify that they are not in one of the situations mentioned above, applicants for an EU grant exceeding 60 000 EUR must provide a declaration on their honour certifying that they are not in any of the situations referred above. This declaration on honour constitutes a specific section or an annex of the application form.

In case of proposals submitted on behalf of a consortium of partners, the criteria described above apply to all participating organisations involved in the project.

In accordance with Articles from 106 to 109 of the EU Financial Regulation, administrative and financial penalties may be imposed on applicants who are guilty of misrepresentation or are found to have seriously failed to meet their contractual obligations under a previous grant award procedure[228].

Furthermore, the Commission considers that for the implementation of Actions covered by the Programme Guide, the following organisations are or could be in a situation of conflict of interest and therefore are or could be not eligible to participate:

- National Authorities in charge of supervising National Agencies and the implementation of the Erasmus+ Programme in their country cannot apply or participate in any Action managed by National Agencies in any country, but may apply for participation (as applicants or partners) in Actions managed by the Executive Agency or by DG EAC unless that is explicitly excluded for the Action concerned (as indicated in Part B of the Guide);

- National Agencies (sole activity of their legal entity) or National Agencies departments of legal entities dealing with activities outside the remit of National Agencies cannot apply or participate in any Action implemented through this Guide;

- Structures and networks identified or designated in the Erasmus+ Programme or in any Annual Commission Work programme adopted for the implementation of the Erasmus+ Programme for specifically receiving a financial contribution from the Commission under the implementation of the Erasmus + Programme, which are hosted by the legal entity that also hosts the National Agency, cannot apply or participate in any Action managed by Erasmus + National Agencies in any country, but may apply for participation (as applicants or partners) in Actions managed by the Executive Agency or by DG EAC unless that is explicitly excluded for the Action concerned (as indicated in Part B of the Guide); they should be able to demonstrate, before being awarded a grant or a contract, that they are not in a conflict of interest either because precautionary measures are taken by them or because their internal organisation is such that there is a clear separation of interests. Furthermore, costs and revenues of each action or activity for which the EU funds are awarded must be identified. The decision for admitting there is sufficient assurance they are not in an actual conflict of interest is taken by the Executive Agency or by DG EAC, under their own responsibility and accountability, to which they apply;

- Legal entities hosting the Erasmus+ National Agencies but dealing with other activities inside or outside the remit of the Erasmus + Programme, as well as entities affiliated to these legal entities, cannot apply or participate in any Action managed by National Agencies in any country, but may in principle apply for participation in Actions managed by the Executive Agency or DG EAC unless that is explicitly excluded for the Action concerned (as indicated in Part B of the Guide). However, they have to demonstrate, before being awarded a grant or a contract, they are not in a conflict of interest either because precautionary measures are taken by them or because their internal organisation is such that there is a clear separation of interests.(e.g. a minimum separation of accounts, separation of reporting and decision making lines, measures to prevent access to privileged information). Furthermore, costs and revenues of each action or activity for which the EU funds are awarded must be identified. The decision for admitting there is sufficient assurance they are not in an actual conflict of interest is taken by the Institution, under their own responsibility and accountability, to which they apply.

## SELECTION CRITERIA

Through the selection criteria, the National or Executive Agency assesses the applicant's financial and operational capacity to complete the proposed project.

[228] Except for actions implemented by National Agencies

### FINANCIAL CAPACITY

Financial capacity means that the applicant has stable and sufficient sources of funding to maintain its activity throughout the period during which the project is being carried out or the year for which the grant is awarded and to participate in its funding.

The verification of the financial capacity does not apply to:

- public bodies[229];
- international organisations.

In case of EU grant requests submitted by other types of organisations (i.e. other than those mentioned above) and not exceeding 60 000 EUR, applicants must provide a declaration on their honour certifying that they have the financial capacity to implement the project. This declaration on honour constitutes a specific section of the application form.

In case of EU grant requests submitted by other types of organisations and exceeding 60 000 EUR, the applicant must submit, in addition to the declaration on honour, the following documents through the Participant Portal:

- For Actions managed by the National Agencies: the applicant's profit and loss account and the balance sheet for the last financial year for which accounts were closed;
- For Actions managed by the Executive Agency: a Financial Capacity Form filled in with the relevant statutory accounting figures and the financial statements (including the profit and loss account, the balance sheet, and other annexes if relevant) for the last two financial years for which accounts were closed;
- For entities which cannot provide the above documents because they are newly created, a financial declaration or an insurance declaration stating the applicant's professional risks may replace the above documents.

Organisations must upload these documents in the Participants Portal either at the time of their registration in the Portal (see section "Step1: Register in the Participants Portal" above) or by the deadline stipulated by the specific Erasmus+ action.

Following a risk-assessment carried out by the National Agency and in case of doubt on the financial capacity of any of the participating organisations involved in a project if the proposal is submitted on behalf of a consortium of partners, the same documents may be requested from the participating organisations by the National Agency or the Executive Agency, even if the granted amount is below the threshold of EUR 60 000 or if the cumulated granted amount to the same organisation exceeds the threshold of EUR 60 000.

Where the application concerns grants for a project for which the amount exceeds 750 000 EUR, in addition to the above, an audit report produced by an approved external auditor may be requested. That report shall certify the accounts for the last financial year available.

If, following the analysis of these documents, the National or Executive Agency concludes that the required financial capacity has not been proved or is not satisfactory, then they may:

- ask for further information;
- offer a grant agreement or decision with a pre-financing covered by a financial guarantee[230];
- offer a grant agreement or grant decision without pre-financing or with a reduced pre-financing;
- offer a grant agreement or grant decision with pre-financing based on several instalments;
- reject the application.

### OPERATIONAL CAPACITY

Operational capacity means that the applicant has the necessary professional competencies and qualifications to carry out the proposed project. Applicants must provide a declaration on their honour certifying that they have the operational capacity to implement the project. In addition, if required in the application form and if the grant exceeds 60 000 EUR, applicants may be asked to submit the CVs of the key persons involved in the project to demonstrate their relevant professional experience or other supporting documents such as:

- A list of relevant publications of the main team;
- An exhaustive list of previous projects and activities performed and connected to the policy field or to this specific action.

[229] Including schools, higher education institutions and organisations in the fields of education, training, youth and sport that have received over 50 % of their annual revenue from public sources over the last two years shall be considered as having the necessary financial, professional and administrative capacity to carry out activities under the Programme.

[230] The guarantee may be replaced by a joint guarantee, or from several guarantees from the participating organisations who are co-beneficiaires of the project.

### AWARD CRITERIA

The award criteria allow the National or Executive Agency to evaluate the quality of the project proposals submitted in the framework of the Erasmus+ Programme.

Within the limits of the budget available for each Action, grants will be awarded to those projects which respond to these qualitative criteria in the best way.

The full set of award criteria applying to each of the Actions implemented through the Erasmus+ Programme Guide are described in Part B of the Guide.

## STEP 3: CHECK THE FINANCIAL CONDITIONS

### TYPES OF GRANT

The grant may be any of the following types[231]:

- reimbursement of a specified proportion of the eligible costs actually incurred: e.g. the amount awarded under the framework of Strategic Partnerships to cover additional costs linked to the participation of persons with special needs;
- reimbursement on the basis of contribution to unit costs: e.g. the amount awarded for the individual support in the framework of mobility projects in the field of education, training and youth;
- lump sums: e.g. the amount awarded to contribute to the implementation of complementary activities under Jean Monnet Projects;
- flat-rate financing: e.g. the amount awarded to cover indirect costs for not-for-profit sport events;
- a combination of the above.

The financing mechanism applied under the Erasmus+ Programme in most cases provides grants based on the reimbursement on the basis of contribution to unit costs. These types of grant help applicants to easily calculate the requested grant amount and facilitate a realistic financial planning of the project.

To know which type of grant is applied to each funding item under each Erasmus+ Action covered by this Guide, please see the column "financing mechanism" in the "funding rules" tables in Part B.

### PRINCIPLES APPLYING TO EU GRANTS

#### NON RETROACTIVITY

No EU grant may be awarded retroactively for projects already completed.

An EU 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 grant agreement has been signed or the grant decision has been notified. In such cases, the costs eligible for financing must not have been incurred prior to the date of submission of the grant application.

If the applicant starts implementing the project before the grant agreement is signed or the grant decision is notified, this is done at the risk of the applicant.

#### NON-CUMULATIVE AWARD

Each project financed by the EU is entitled to receive only one grant from the EU budget to any one beneficiary. In no circumstances shall the same costs be financed twice by the Union budget.

To avoid the risk of double-funding, the applicant must indicate in the relevant section of the application form, the sources and the amounts of any other funding received or applied for in the year, whether for the same project or for any other project, including operating grants.

[231] COMMISSION DECISION C(2013)8550 of 04 December 2013 on "The use of lump sums, the reimbursement on the basis of unit costs and the flat-rate financing under the "Erasmus+" Programme", (http://ec.europa.eu/dgs/education_culture/more_info/awp/docs/c_2013_8550.pdf)

Identical or very similar applications –submitted by the same applicant or by other partners of the same consortium – will be subject to a specific assessment in order to exclude the risk of double-funding and may all be rejected.

### MULTIPLE SUBMISSIONS

For decentralised actions managed by the Erasmus+ National Agencies, applications which are submitted twice or more times by the same applicant or consortium, either to the same Agency or to different Agencies will all be rejected. Where the same or very similar applications are submitted by different applicants or consortia, they will be subject to a specific assessment and may be all rejected.

### NO-PROFIT AND CO-FINANCING

A grant financed from the Union budget must not have the purpose or effect of producing a profit within the framework of the project carried out by the beneficiary. Profit is defined as surplus of the receipts over the eligible costs incurred by the beneficiary, when the request is made for payment of the balance[232]. The no-profit principle does not apply to grants provided in the form of a unit cost, a lump sum or a flat-rate financing, including scholarships, neither to grant requests that do not exceed 60 000 EUR. For the purpose of calculating the profit generated by the grant, co-financing in the form of contributions in kind will not be taken into account.

Furthermore, an EU grant is an incentive to carry out a project which would not be feasible without the EU financial support, and is based on the principle of co-financing. Co-financing implies that the EU grant may not finance the entire costs of the project; the project must be funded by sources of co-financing other than the EU grant (e.g. beneficiary's own resources, income generated by the action, financial contributions from third parties).

When the EU grant is provided in the form of a unit cost, a lump sum or a flat-rate financing - this is the case for most of the Actions covered by this Guide - the principles of no-profit and co-funding are ensured by the Commission for the Action as a whole in advance when it defines the rates or percentages of such units, lump sums and flat-rates. The respect of the no-profit and co-financing principles is generally assumed and therefore, applicants do not have to provide information about sources of funding other than the EU grant, nor they have to justify the costs incurred by the project.

However, the payment of the grant based on the reimbursement on the basis of contribution to unit costs, lump sums, or flat-rate financing is without prejudice to the right of access to the beneficiaries' statutory records. Where a check or audit reveals that the generating event has not occurred (e.g. project activities not realised as approved at application stage, participants not taking part in the activities, etc.) and an undue payment has been made to the beneficiary on a grant based on the reimbursement on the basis of contribution to unit costs, lump sums, or flat-rate financing, the National or Executive Agency shall be entitled to recover up to the amount of the grant. Similarly, if the activities undertaken or the outputs produced are of insufficient quality, the grant may be reduced partly or in full even if the activities have taken place and are eligible.

In addition, for statistical and monitoring purposes the European Commission may carry out surveys on samples of beneficiaries aimed at quantifying the actual costs incurred in projects funded based on the reimbursement on the basis of contribution to unit costs, lump sums, or flat-rate financing.

### SPECIFIC PROVISIONS APPLYING TO GRANTS PAID ON THE BASIS OF REIMBURSEMENT OF A SPECIFIED PORTION OF ELIGIBLE COSTS

When the EU grant is provided as a reimbursement of a specified portion of eligible costs, the following provisions apply:

[232] To this aim, the receipts are limited to income generated by the project, as well as financial contributions specifically assigned by donors to the financing of eligible costs. The profit (or the loss) as defined above is then the difference between:

- the provisionally accepted amount of the grant, the income generated by the action and the financial contributions specifically assigned by donors to the financing of eligible costs, and
- the eligible costs incurred by the beneficiary.

In addition, whenever a profit is made, it will be recovered. The National Agency or Executive Agency are entitled to recover the percentage of the profit corresponding to the Union contribution to the eligible costs actually incurred by the beneficiary to carry out the action. Further clarifications on the calculation of the profit will be provided for actions for which grants take the form of reimbursement of a specified proportion of eligible costs.

## ELIGIBLE COSTS

An EU grant must not exceed an overall amount which is established by the National or Executive Agency at the time of the project selection on the basis of the estimated eligible costs indicated in the application form. Eligible costs are costs actually incurred by the beneficiary of a grant which meet all of the following criteria:

- they are incurred during the lifetime of the project, with the exception of costs relating to final reports and audit certificates;
- they are indicated in the estimated overall budget of the project;
- they are necessary for the implementation of the project which is the subject of the grant;
- they are identifiable and verifiable, in particular being recorded in the accounting records of the beneficiary and determined according to the applicable accounting standards of the country where the beneficiary is established and according to the usual cost accounting practices of the beneficiary;
- they comply with the requirements of applicable tax and social legislation;
- they are reasonable, justified, and comply with the principle of sound financial management, in particular regarding economy and efficiency.
- They are not covered through EU grants in the form of contribution to unit costs, lump sums or flat-rate financing.

The following categories of costs are also considered eligible:

- costs relating to a pre-financing guarantee lodged by the beneficiary of the grant, where that guarantee is required by the National or Executive Agency;
- costs relating to external audits where such audits are required in support of the requests for payments by the National or Executive Agency;
- depreciation costs, provided they are actually incurred by the beneficiary.

The beneficiary's internal accounting and auditing procedures must permit direct reconciliation of the costs and revenue declared in respect of the project with the corresponding accounting statements and supporting documents.

Value Added Tax (VAT)

Value added tax will be considered as an eligible cost only if it is not recoverable under the applicable national VAT legislation[233]. The only exception relates to activities or transactions in which states, regional and local government authorities and other public bodies engage as public authorities[234]. In addition:

- deductible VAT not actually deducted (due to national conditions or to the carelessness of beneficiaries) is not eligible;
- the VAT Directive does not apply to non EU countries. Organisations from Partner Countries can be exempted from taxes (including VAT), duties and charges, if an agreement has been signed between the European Commission and the Partner Country where the organisation is established.

Eligible indirect costs

For certain types of projects (for details of the funding rules for Actions, please consult Part B of this Guide) a flat-rate amount not exceeding 7% of the eligible direct costs of the project is eligible under indirect costs, representing the beneficiary's general administrative costs (e.g. electricity or Internet bills, cost for premises, cost of permanent staff, etc.) which can be regarded as chargeable to the project.

Indirect costs may not include costs entered under another budget category. Indirect costs are not eligible where the beneficiary already receives an operating grant from the Union budget (for example in the framework of the call for proposals on Civil Society Cooperation under the Erasmus+ Programme).

## INELIGIBLE COSTS

The following costs shall not be considered eligible:

- return on capital;
- debt and debt service charges;
- provisions for losses or debts;
- interest owed;
- doubtful debts;

[233] In the Member States the VAT national legislation translates the VAT Directive 2006/112/EC.
[234] See article 13(1) of the Directive.

- exchange losses;
- VAT, when it is considered as recoverable under the applicable national VAT legislation (see above paragraph on Value Added Tax);
- costs declared by the beneficiary and covered by another project or work programme receiving an EU grant (see also above paragraph on eligible indirect costs);
- excessive or reckless expenditure;
- contributions in kind;
- in the case of renting or leasing of equipment, the cost of any buy-out option at the end of the lease or rental period;
- costs of opening and operating bank accounts (including costs of transfers from/to the National or Executive Agency charged by the bank of the beneficiary).

#### SOURCES OF FINANCING

The applicant must indicate in the application form the contribution from sources other than the EU grant. External co-financing may take the form of the beneficiary's own resources, financial contributions from third parties or income generated by the project. If, at the time of the final report and request of payment of the balance, there is evidence that there is a surplus of the income over the eligible costs incurred by the project, the National Agency or Executive Agency is entitled to recover the percentage of the profit corresponding to the Union contribution to the eligible costs actually incurred by the beneficiary to carry out the project. This provision does not apply to projects requesting a grant that does not exceed 60 000 EUR.

Contributions in kind are not considered as a possible source of co-financing.

## STEP 4: FILL IN AND SUBMIT THE APPLICATION FORM

To request an EU grant under the Erasmus+ Programme, applicants must use the forms specific for each Action and available on the websites of the European Commission, of the National Agencies or of the Executive Agency (for the contact details, see Annex IV of this Guide).

In case of projects submitted on behalf of consortia, the coordinating organisation or group submits a single application for the whole project on behalf of all the participating organisations. The application must be submitted to the appropriate National or Executive Agency (see sections "where to apply" for each Action, in Part B of this Guide).

#### APPLICATION PROCEDURE

#### ONLINE E-FORMS

For most Actions of the Programme, applicants are required to submit their application online to the appropriate National or Executive Agency using the correct electronic form and including all requested annexes.

The electronic form must be completed in one of the official languages used in Programme Countries. In case of Actions managed at centralised level by the Executive Agency, applicants must fill in the form in one of the EU official languages.

For more information, consult the guidelines on how to fill in and submit an electronic form. These guidelines also provide information on what to do in case of technical problems; they are available on the websites of the National Agencies (specific for decentralised Actions), Executive Agency (specific for centralised Actions) and European Commission.

In case of multiple submissions of the same application in the same selection round to the same National Agency or the Executive Agency, the National or Executive Agency will always consider valid the last version submitted before the deadline has expired. Applications sent by post, courier service, fax or email will not be accepted. In case of multiple submissions of the same or very similar applications of the same applicant organisation or consortium to different Agencies, all applications will be automatically rejected (see section on non-cumulative award).

#### APPLICATION FORMS ON PAPER

Some centralised Actions of the Programme may not be supported by electronic forms. For these Actions, applications must be sent by post (date as per postmark) or courier service (date of receipt by the courier service) to the Executive Agency (see contact details in Annex IV of this Guide). Applications sent by fax or email will not be accepted.

Applicants cannot make any changes to their grant application after the submission deadline.

## RESPECT THE DEADLINE

The application must be submitted by the deadline set for each Action. The deadlines for the submission of projects are specified for each Action in the Part B "Eligibility Criteria" of this Guide.

**N.B.: irrespective of the day of the deadline, the deadline for submission of electronic forms is always set at 12:00 (midday Brussels time). Applicants established in countries that have a different time zone should carefully consider the time differences to avoid rejections.**

# WHAT HAPPENS ONCE THE APPLICATION IS SUBMITTED?

All applications received by the National Agencies or by the Executive Agency undergo an evaluation procedure.

## THE EVALUATION PROCEDURE

Project proposals are assessed by the National or Executive Agency receiving the application, exclusively on the basis of the criteria described in this Guide. The assessment implies:

- a formal check to verify that the eligibility and exclusion criteria are respected;
- a quality assessment to evaluate the extent to which the participating organisations meet the selection criteria (i.e. operational and financial capacity) and the project meets the award criteria. Such quality assessment is in most cases carried out with the support of independent experts. In their assessment, experts will be supported by guidelines developed by the European Commission; these guidelines will be made available on the websites of the European Commission and of the Agencies responsible for the management of Erasmus+ projects;
- a verification, that the proposal does not present risks of double funding. If necessary, such verification is carried out in cooperation with other Agencies or other stakeholders.

The National or Executive Agency will appoint an evaluation committee to oversee the management of the whole selection process. On the basis of the assessment carried out by experts, the evaluation committee will establish a list of projects proposed for selection.

In the cases of Capacity Building in the field of higher education and considering the development objectives of the action in favour of eligible Partner Countries of the world (see section "Eligible countries" in Part A of this Guide), the Evaluation Committee establishes a ranking of eligible proposals per region and submits the proposals ranked with the highest scores to the EU Delegations who are consulted on the relevance and feasibility of the project in the local context, namely:

- relevance of the project objectives to the reform and modernisation of higher education systems in the partner country;
- relevance of the project proposal to the particular needs and feasibility constraints of the partner country/countries or region(s) (including synergy with any other initiatives and avoidance of duplication);
- the extent to which the project addresses the beneficiary's particular needs for capacity building.

For all actions covered by this Guide, during the evaluation process, applicants may be asked to provide additional information or to clarify the supporting documents submitted in connection with the application, provided that such information or clarification does not substantially change the proposal. Additional information and clarifications are particularly justified in case of obvious clerical errors made by the applicant, or in those cases where –for projects funded through multi-beneficiary agreements – one or more mandates of the partners are missing (for multi-beneficiary agreements, see section “grant agreement/decision below”) .

## FINAL DECISION

At the end of the evaluation procedure, the National or Executive Agency decides on the projects to be granted on the basis of:

- the ranking list proposed by the evaluation committee;
- the budget available for any given Action (or any given activity within an Action)

and in addition, for Capacity Building in higher education the decision is also made on the basis of:

- the results from the consultation process (see above);
- the budget available for any given region of the world, as defined in the financial instruments of the EU external action;
- the need to achieve a sufficient geographical representation within a region in terms of number of projects per country, within the limits of the available budget and provided that sufficient quality is guaranteed;
- the need to ensure that the overall results of the selection guarantees a sufficient coverage of the priorities of the Action.

After the completion of the selection procedure, the application files and accompanying material are not sent back to the applicant, irrespective of the outcome of the procedure.

### NOTIFICATION OF GRANT AWARD DECISIONS

The indicative calendar for the notification of selection results under each Action is indicated in the section "Project life-cycle deadlines and payment modalities" below.

## WHAT HAPPENS WHEN THE APPLICATION IS APPROVED?

### GRANT AGREEMENT/DECISION

If the project is selected for an EU grant under Erasmus+:

- a grant decision - taken by the Executive Agency - is notified to the applicant of a selected project. Upon receipt/notification of the decision, the applicant becomes the beneficiary of an EU grant and can start the project[235];

- a grant agreement is signed between the National or Executive Agency selecting the project and the applicant. The applicant will receive the grant agreement, to be signed by its legal representative and returned to the National or Executive Agency; the National or Executive Agency is the last party to sign. When the grant is signed by both parties, the applicant becomes beneficiary of an EU grant and can start the project[236].

Depending on the type of Action, grant agreements may take the form of mono-beneficiary agreements, with the applicant being the single beneficiary, or multi-beneficiary agreements, where all partners organisations of the consortium become beneficiaries of the agreement. The multi-beneficiary agreement is signed by the coordinator which is the only contact point for the National or Executive Agency. However, all other organisations participating in a project (co-beneficiaries) sign a mandate to confer to the coordinator the responsibility of acting as main beneficiary. As a general rule, the mandates of each partner to the applicant will have to be provided at application stage. If these mandates are provided at a later stage, they must be made available at the latest by the time of the grant agreement signature.

Nota bene: Mandates are not required for partner organisations in countries other than the country of the applicant organisation in the case of Mobility projects for Higher education students and staff, Mobility projects for VET learners and staff, Mobility Projects for School education staff and Mobility Projects for Adult education staff. However, member organisations of national consortia in the fields of higher education, VET, school and adult education are required to provide a mandate to the applicant organisation.

As an exception, in Strategic Partnerships using the "School Exchange Partnerships" format, each participating organisation involved in a selected project will sign a separate (monobeneficiary) grant agreement – specific for its share of the grant - with the National Agency established in its own country.

Models of grant agreements and grant decisions used under the Erasmus+ Programme will be made available in the course of the year on the websites of the European Commission and Executive Agency.

The indicative calendar for the receipt of grant agreements and grant decisions under each Action is indicated in the in the section "Project life-cycle deadlines and payment modalities" below.

### GRANT AMOUNT

The acceptance of an application does not constitute an undertaking to award funding equal to the amount requested by the applicant. The funding requested may be reduced on the basis of the specific financial rules applying to a given Action.

The award of a grant in a given round of selection does not establish an entitlement for subsequent rounds.

It should be noted that the grant amount foreseen by the agreement is a maximum which cannot be increased, even if the beneficiary requests a higher amount.

Funds transferred by the Executive Agency or the National Agency must be identified within the account or sub-account indicated by the beneficiary for the payment of the grant.

[235] For exceptions to this rule, see the section "non -retroactivity " in this part of the Guide.
[236] See footnote above.

# PAYMENT PROCEDURES

Depending on the type of Action, duration of the grant agreement/decision and the assessment of financial risk, projects supported under the Erasmus+ Programme are subject to different payment procedures.
Except for the first pre-financing payment, other payments or recoveries will be made on the basis of the analysis of reports or payment requests submitted by the beneficiary (the templates of these documents will be made available in the course of the year on the websites of National Agencies and Executive Agency).
The payment procedures applied under Erasmus+ are described below.

## PRE-FINANCING PAYMENT

A pre-financing payment will be transferred to the beneficiary within 30 days of the date when the last of the two parties signs the grant agreement or when the grant decision is notified to the beneficiary, and where relevant, any appropriate guarantees are received (see section "financial guarantee" below). Pre-financing is intended to provide the beneficiary with a float. National Agencies or the Executive Agency may decide to split the first pre-financing payment into more instalments. They may also decide to reduce the pre-financing or not pay any pre-financing at all, if the financial capacity of the beneficiary is not deemed satisfactory.

## FURTHER PRE-FINANCING PAYMENTS

Under some Actions, a second – and in some cases a third - pre-financing payment will be transferred to the beneficiary within 60 calendar days of the receipt, by the National or Executive Agency, of the further pre-financing payment requests advanced by the beneficiary if the further pre-financing payment request is accompanied by an interim report. These further pre-financing payments may be requested when at least 70% of the previous pre-financing payment has been used up. Where the statement on the use of the previous pre-financing payment(s) shows that less than 70% of the previous pre-financing payment(s) has been used to cover costs of the action, the amount of the new pre-financing to be paid shall be reduced by the unused amounts of the previous pre-financing.

## INTERIM OR PROGRESS/TECHNICAL REPORTS

Under some Actions, beneficiaries will be asked to submit an interim report accompanying the request for a further pre-financing payment. In other cases, beneficiaries can be as well requested to submit a progress/technical report informing on the state of implementation of the project. Progress/technical reports do not trigger a further pre-financing payment. The interim and the progress/technical reports must be submitted by the deadline indicated in the grant agreement or grant decision.

## PAYMENT OR RECOVERY OF THE BALANCE

The amount of the final payment to be made to the beneficiary will be established on the basis of a final report to be submitted by the deadline indicated in the grant agreement or grant decision. If a) the events generating the grant are not implemented or are implemented in a different way than planned; or b) the eligible costs actually incurred by the beneficiary are lower than those planned at application stage, or c) the quality of the realised activities/outputs is of insufficient quality, the funding may be reduced proportionally or, where applicable, the beneficiary will be required to repay any excess amounts already received as pre-financing payment.

Under some Actions, the National or Executive Agency transfers 100% of the grant awarded through the pre-financing instalments. In such cases a payment of the balance is not due. However, if - on the basis of a final report to be submitted by the beneficiary by the deadline indicated in the grant agreement - a) the events generating the grant are not implemented or are implemented in a different way than planned; or b) the eligible costs actually incurred by the beneficiary are lower than those planned at application stage, or c) the quality of the realised activities/outputs is of insufficient quality, the beneficiary will be required to repay any excess amounts already received as pre-financing payment.

As a general rule, the final payment or request for recovery of the balance will be issued within 60 calendar days of the receipt of the final report.

For more information, the detailed modalities of payment applying to each Action can be found in the section "Project life-cycle deadlines and payment modalities" below.

## FINANCIAL PENALTIES

Beneficiaries of centralised actions who have been found in serious breach of their contractual obligations may be subject to financial penalties, in the terms stated in the Grant Agreement.

## PROJECT LIFE-CYCLE DEADLINES AND PAYMENT MODALITIES

| | project life-cycle deadlines | | | payment modalities | | |
|---|---|---|---|---|---|---|
| | **Indicative date of notification of award decision** | **Indicative date for signing grant agreement** | **Date of final payment/request for reimbursement of the balance** | **N. of pre-financings** | **Interim (technical) report** | **% of grant provided at different stages** |
| KA1 - Mobility of higher education students and staff | 4 months from the submission deadline | 4 months from the submission deadline | Within 60 calendar days from the receipt of the final report by NA | 2 | Yes | Prefin.: 80%-20%<br>Balance: 0% |
| KA1 - Other types of mobility (VET, school education, adult education and youth) | 4 months from the submission deadline | 4 months from the submission deadline | Within 60 calendar days from the receipt of the final report by NA | 1 | No | Prefin.: 80%<br>Balance: 20% |
| KA1 – VET (optional) | 4 months from the submission deadline | 4 months from the submission deadline | Within 60 calendar days from the receipt of the final report by NA | 2 | Yes | Prefin.: 80%-20%<br>Balance: 0% |
| KA1 - Erasmus Mundus Joint Master Degrees | 5 months from the submission deadline | 6 months from the submission deadline | No balance payment foreseen | 3 | No | Prefin.: 25%-50%-25%<br>Balance: 0% |
| KA2 – Strategic Partnerships lasting up to 2 years | 4 months from the submission deadline | 5 months from the submission deadline | Within 60 calendar days from the receipt of the final report by NA | 1 | No | Prefin.: 80%<br>Balance: 20% |
| KA2 – Strategic Partnerships lasting between 2 and 3 years | 4 months from the submission deadline | 5 months from the submission deadline | Within 60 calendar days from the receipt of the final report by NA | 2 | Yes | Prefin.: 40%-40%<br>Balance: 20% |
| KA2 – Strategic Partnerships – School Exchange Partnerships format (optional) | 4 months from the submission deadline | 6 months from the submission deadline | Within 60 calendar days from the receipt of the final reports by all NAs involved | 2 | Yes | Prefin.: 80%-20%<br>Balance: 0% |
| KA2 - Knowledge Alliances and Sector Skills Alliances | 5 months from the submission deadline | 7 months from the submission deadline | Within 60 days from the receipt of the final report by EACEA | 2 | Yes | Prefin.: 40%-40%<br>Balance: 20% |
| KA2 – Capacity Building for Higher Education | 6 months from the submission deadline | 7 months from the submission deadline | Within 60 days from the receipt of the final report by EACEA | 2 | Yes | Prefin.: 50%-40%<br>Balance: 10% |
| KA2 – Capacity Building in the youth field | 5 months from the submission deadline | 6 months from the submission deadline | Within 60 days from the receipt of the final report by EACEA | 1 | Yes | Prefin.: 80%<br>Balance: 20% |
| KA3 – Structured Dialogue Meetings | 4 months from the submission deadline | 4 months from the submission deadline | Within 60 calendar days from the receipt of the final report by NA | 1 | No | Prefin.: 80%<br>Balance: 20% |

| | project life-cycle deadlines | | | payment modalities | | |
|---|---|---|---|---|---|---|
| | **Indicative date of notification of award decision** | **Indicative date for signing grant agreement** | **Date of final payment/request for reimbursement of the balance** | **N. of pre-financings** | **Interim (technical) report** | **% of grant provided at different stages** |
| Jean Monnet activities | 5 months from the submission deadline | 6 months from the submission deadline | Within 60 days from the receipt of the final report by EACEA | 1 | Yes | Prefin.: 70%<br>Balance: 30% |
| Sport - Collaborative Partnerships | 5 months from the submission deadline | 6 months from the submission deadline | Within 60 days from the receipt of the final report by EACEA | 1 | No | Prefin.: 70%<br>Balance: 30% |
| SPORT – SMALL COLLABORATIVE PARTNERSHIPS | 5 months from the submission deadline | 6 months from the submission deadline | Within 60 days from the receipt of the final report by EACEA | 1 | NO | PREFIN.: 70%<br>BALANCE: 30% |
| Sport – Not-for-profit European sport events | 5 months from the submission deadline | 6 months from the submission deadline | Within 60 days from the receipt of the final report by EACEA | 1 | No | Prefin.: 70%<br>Balance: 30% |

For Strategic Partnerships using the School Exchange Partnerships format and Key Action 1 projects in the field of VET, depending on the national legal framework and the legal status of organisations involved in the project, the National Agency may decide to apply a 100% pre-financing model. For Key Action 1 projects in the field of VET, the National Agency may decide to use the 100% pre-financing model only if the applicant is a school according to the national law. In cases where this model is not applied, the other financing models applicable for these actions will be used.

Please note that the indicative dates provided in the table above are given for general information only and do not constitute a legal obligation for the National Agencies and the Executive Agency. Similarly as regards the payment modalities presented above, it should be noted that they will be applied in general, but depending on the individual situation of the applicant organisation or consortium concerned (e.g., depending on the financial capacity), different arrangements may be provided for in the grant agreement or grant decision. In case of a shortage of EU appropriations for a given budget year, the first pre-financing payment levels may be further reduced.

# OTHER IMPORTANT CONTRACTUAL PROVISIONS

## FINANCIAL GUARANTEE

If the financial capacity is not considered satisfactory, the National or Executive Agency may require any beneficiary which has been awarded a grant exceeding 60 000 EUR to lodge a guarantee in advance in order to limit the financial risks connected with the pre-financing payment. This guarantee can be requested for up to the same amount of the pre-financing payment(s).

The purpose of such guarantee is to make a bank or financial institution stand as irrevocable collateral security or first-call guarantor of the beneficiary's obligations deriving from the grant agreement or grant decision.

This financial guarantee, in euro, shall be provided by an approved bank or financial institution established in an EU Member State. When the beneficiary is established in a non-EU country, the National or Executive Agency may agree that a bank or financial institution established in such country provides the guarantee, if it considers that the bank or financial institution offers equivalent financial security and characteristics as those offered in an EU Member State.

The guarantee may be replaced by a joint third-party guarantee, or from several third-party guarantees from the participating organisations who are parties to the same grant agreement.

The guarantee will be released after the pre-financing is gradually cleared against an interim payment or payment of the balance to the beneficiary, in accordance with the conditions laid down in the grant agreement or grant decision. In case the payment of the balance takes the form of a recovery, the guarantee will be released after the beneficiary is notified.

## SUB-CONTRACTING AND AWARD OF PROCUREMENT CONTRACT

The beneficiary may resort to subcontracting for specific technical services requiring specialised skills (relating to the legal, accounting, tax, human resources fields, IT, etc.) or implementation contracts. The costs incurred by the beneficiary for this type of services may therefore be considered eligible costs provided they meet all the other criteria described in the grant agreement or grant decision.

Where implementation of the project requires the procurement of goods, works or services (implementation contract), beneficiaries must award the contract to the economically most advantageous offer, i.e. the bid offering the best value for money, or, as appropriate to the tender offering the lowest price, ensuring that there is no conflict of interests and that documentation is retained in case of audit.

In the event of implementation contract exceeding a value of 60 000 EUR (or 25.000 EUR for the Capacity Building in higher education action), the National or Executive agency may impose special rules on the beneficiary, in addition to those referred to in the previous paragraph. Those special rules would be published on the websites of the National Agencies and Executive Agency.

## INFORMATION ON THE GRANTS AWARDED

In line with the principle of transparency and the requirement for ex-post publicity, information on the recipients of the Union funds must be published on the website of the Commission, the Executive Agency and/or the National Agencies during the first half of the year following the closure of the financial year for which they were awarded.

The information may also be published in any other appropriate medium, including the Official Journal of the European Union.

The National Agencies and the Executive Agency will publish the following information:

- name and locality of the beneficiary;
- amount of grant awarded;
- nature and purpose of the award.

Upon a reasoned and duly substantiated request by the beneficiary, the publication shall be waived if such disclosure risks threatening the rights and freedoms of individuals concerned as protected by the Charter of Fundamental Rights of the European Union or harm the commercial interests of the beneficiaries.

As far as personal data referring to natural persons are concerned, the information published shall by removed two years after the end of the financial year in which the funds were awarded.

The same shall apply to personal data indicated in the official titles of legal persons (e.g. an association or company having as title the names of their founders).

This information shall not be published for scholarships paid to natural persons and other direct support paid to natural persons in most need (refugees and unemployed persons). Also the beneficiary organisations are not authorised to publish this type of information in relation to persons receiving a mobility grant under Erasmus+.

## PUBLICITY

Apart from the requirements regarding the visibility of the project and for the dissemination and exploitation of its results (which are award criteria), there is an obligation of minimal publicity for each granted project.

Beneficiaries must clearly acknowledge the European Union's support in all communications or publications, in whatever form or whatever medium, including the Internet, or on the occasion of activities for which the grant is used.

This must be done according to the provisions included in the grant agreement or grant decision. If these provisions are not fully complied with, the beneficiary's grant may be reduced.

Please refer to the Dissemination Guidelines for beneficiaries in Annex II of this Guide for further requirements regarding the visibility of the project.

## CHECKS AND AUDITS

The National or Executive Agency and/or the European Commission may carry out technical and financial checks and audits in relation to the use of the grant. They may also check the statutory records of the beneficiary (or co-beneficiary) for the purpose of periodic assessments of lump sum, unit cost or flat-rate financing. The beneficiary (or co-beneficiary) will undertake, with the signature of its legal representative, to provide proof that the grant has been used correctly. The European Commission, the Executive Agency, National Agencies and/or the European Court of Auditors, or a body mandated by them, may check the use made of the grant at any time up to five years, or for up to three years for grants not exceeding 60 000 EUR, starting from the date of payment of the balance or execution of the recovery by the National or Executive Agency. Therefore, beneficiaries shall keep records, original supporting documents, statistical records and other documents connected with the grant during this period.

For projects managed at centralised level by the Executive Agency, different types of audit procedures may be applied according to the type of Action concerned and the size of the grant awarded (if applicable, Audit Type I for grants exceeding 60 000 EUR and lower than 750 000 EUR; Audit Type II for grants of 750 000 EUR or higher). More information is available on the website of the Executive Agency.

The detailed provisions concerning checks and audits are described in the grant agreement or grant decision.

## DATA PROTECTION

Any personal data included in the application form or in the grant agreement/decision shall be processed by the National or Executive Agency, or by the European Commission in accordance with:

- Regulation (EC) No 45/2001 of the European Parliament and of the Council on the protection of individuals with regard to the processing of personal data by the European Union institutions and bodies and on the free movement of such data;
- where applicable, the national legislation on personal data protection of the country where the application has been selected.

Unless marked as optional, the applicant's replies to the questions in the application form are necessary to evaluate and further process the grant application in accordance with the Erasmus+ Programme Guide. Personal data will be processed solely for that purpose by the department or Unit responsible for the Union grant programme concerned (entity acting as data controller). Personal data may be transferred on a need to know basis to third parties involved in the evaluation of applications or in the grant management procedure, without prejudice of transfer to the bodies in charge of monitoring and inspection tasks in accordance with European Union law or to bodies mandated to undertake evaluations of the Programme or any of its Actions. In particular, for the purposes of safeguarding the financial interests of the Union, personal data may be transferred to internal audit services, to the European Court of Auditors, to the Financial Irregularities Panel or to the European Anti-Fraud Office and between authorising officers of the Commission and the executive agencies. The applicant

shall have the right of access to his/her personal data and the right to rectify any such data. Should the applicant have any queries concerning the processing of his/her personal data, he/she shall address them to the Agency that has selected the project. In case of conflicts; the applicant also has the right of recourse at any time to the European Data Protection Supervisor. More information regarding the processing of personal data is included in the grant agreement or decision.

Concerning the processing of personal data under the Erasmus+ Programme, a detailed privacy statement, including contact information, is available on the website of the Commission and Executive Agency.

Within the framework of centralised actions managed by the Executive Agency, applicants - and, if they are legal entities, persons who are members of the administrative, management or supervisory body of that applicant or who have powers of representation, decision or control with regard to that applicant, or natural or legal persons that assume unlimited liability for the debts of that applicant - are informed that, their personal data (name, given name if natural person, address, legal form and name and given name of the persons with powers of representation, decision-making or control, if legal person) may be registered in the Early Detection and Exclusion System (EDES) by the Authorising Officer of the Agency, should they be in one of the situations mentioned in the Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1605/2002 (OJ L 298 of 26.10.2012, p. 1) as amended by the Regulation (EU, Euratom) 2015/1929 of the European Parliament and of the Council of 28 October 2015 (OJ L 286, 30.10.2015, p. 1).

## OPEN ACCESS REQUIREMENT

Erasmus+ promotes the open access of project outputs to support learning, teaching, training, and youth work. This serves both to ensure that publicly funded materials provide value to the general public, to increase the value, visibility and reuse of the insights and work of a project, and to ensure long-term access to the results, even if e.g. a beneficiary consortium ceases to exist.
In particular, Erasmus+ commits beneficiaries to make any educational resources which are produced in the context of projects supported by the programme - documents, media, software or other materials - freely available for the public under an open license (see next section). Such materials are known as Open Educational Resources (OER). In addition, beneficiaries must ensure that these OER are shared in an editable digital form, freely accessible through the internet (without cost, registration or other restriction), and whenever possible shared on a suitable and freely accessible platform, thus not just a project or institution specific website. The open access requirement is obligatory and is without prejudice to the intellectual property rights of the grant beneficiaries.

## OPEN LICENCE AND INTELLECTUAL PROPERTY RIGHTS

In general, copyright grants the creator of any original work - e.g. an educational resource - the exclusive rights to use this work. Licenses are a common way for copyright holders to allow others to make use of their work. A license defines terms and conditions under which the rightholder grants specific individuals or organisations to use their work.
An open license is a way for the copyright holder (creator or other rightholder) to grant the general public the legal permission to use their work. The applied open license is usually indicated directly on the work and wherever the work is shared. As in the case of other licenses, open licenses do not imply a transfer of copyright or other intellectual property rights. Someone granting an open license for their work still remains the copyright holder of their materials and can themselves use the materials as they wish, e.g. to commercialise their project outcomes. Specifically, an open license applied to educational resources produced with support of Erasmus+, must allow the public (i.e. any third parties) at the minimum to freely:

- Use the work;
- Adapt the work as needed (e.g. translate, shorten, modify for local contexts, etc.);
- Reproduce and share the original or adapted work with others (e.g. with students in the classroom, online, with peers, etc.).

While Erasmus+ encourages beneficiaries to apply the most open licenses[237] to ensure the maximum impact of their works, beneficiaries may choose open licenses with specific conditions, in particular:

- That the creator has to be indicated whenever the work or a derivative is used or shared;
- That the work cannot be used commercially (e.g. sold by others, integrated in a commercial textbook, etc.);
- That any derivatives have to be shared under the same license or licensing terms.

[237] E.g. the widely used Creative Commons Attribution or Creative Commons Attribution-Share Alike licenses for creative works, the GNU Public License and GNU Lesser Public License for software, or the Open Database License for databases..

While beneficiaries are free to choose any open license or even develop their own open license, to avoid duplication of work, ensure legal certainty, and ensure the possibility to combine several works, Erasmus+ beneficiaries are strongly encouraged to make use of well-known existing licenses suitable for the type of resource. The license cannot contain any conditions which limit the user group, which forces users to register, participate, or otherwise undertake any specific activity, or which specifies that the use has to be requested or reported.

## RULES APPLICABLE

The Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1605/2002 (OJ L 298, 26.10.2012, p. 1) as it was amended by Regulation (EU, Euratom) 2015/1929 of the European Parliament and of the Council of 28 October 2015 amending Regulation (EU, Euratom) No 966/2012 on the financial rules applicable to the general budget of the Union (OJ L 286, 30.10.2015, p. 1), and

The Commission Delegated Regulation (EU) No 1268/2012 of 29 October 2012 on the rules of application of Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council on the financial rules applicable to the general budget of the Union (OJ L 362, 31.12.2012, p. 1) as it was amended by Commission Delegated Regulation (EU) 2015/2462 of 30 October 2015 amending Delegated Regulation (EU) No 1268/2012 on the rules of application of Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council on the financial rules applicable to the general budget of the Union (OJ L 342, 29.12.2015, p. 7).

# ANNEX I

# Specific rules and information relating to mobility activities, Strategic Partnerships and Capacity Building in the field of higher education

This Annex contains additional criteria and important information concerning the preparation, implementation and follow-up of mobility projects and higher education degree mobility, as well as several concrete examples of activities which may be realised within the framework of Strategic Partnerships in the fields education, training and youth and further details for Capacity Building in the field of higher education projects. Those organisations who intend to develop a project under these Actions are invited to read carefully the relevant parts of this Annex, before submitting their grant request. The Annex is divided in the following sections:

**MOBILITY PROJECT FOR HIGHER EDUCATION STUDENTS AND STAFF ..... 265**

**MOBILITY PROJECT FOR VET LEARNERS AND STAFF ..... 271**

**MOBILITY PROJECT FOR SCHOOL EDUCATION STAFF ..... 276**

**MOBILITY PROJECT FOR ADULT EDUCATION STAFF ..... 279**

**MOBILITY PROJECT FOR YOUNG PEOPLE AND YOUTH WORKERS ..... 281**

**ERASMUS MUNDUS JOINT MASTER DEGREES ..... 287**

**STRATEGIC PARTNERSHIPS ..... 290**

**CAPACITY BUILDING IN THE FIELD OF HIGHER EDUCATION ..... 302**

# MOBILITY PROJECT FOR HIGHER EDUCATION STUDENTS AND STAFF

## 1. BEFORE MOBILITY

### a. ACCREDITATION OF PARTICIPATING ORGANISATIONS

#### ERASMUS CHARTER FOR HIGHER EDUCATION

The Erasmus Charter for Higher Education (ECHE) provides the general quality framework for European and international cooperation activities a higher education institution (HEI) may carry out within the Programme. The award of an Erasmus Charter for Higher Education is a pre-requisite for all HEIs located in a Programme Country and willing to participate in learning mobility of individuals and/or cooperation for innovation and good practices under the Programme. For HEIs located in Partner Countries, the ECHE is not required, and the quality framework will be established through inter-institutional agreements (see below) between HEIs.

A call for proposals for the award of the ECHE is launched by the Executive Agency in Brussels on an annual basis. If awarded, the Charter is valid for the entire duration of the Programme. The conditions for applying to receive an ECHE are described in the website of the Executive Agency at:https://eacea.ec.europa.eu/erasmus-plus/funding/erasmus-charter-for-higher-education-2014-2020_en.

HEIs must respect all the provisions of the ECHE during the implementation of the project. Their compliance will be monitored by the National Agency, which will base their monitoring strategy on the ECHE Monitoring Guide (https://ec.europa.eu/programmes/erasmus-plus/sites/erasmusplus/files/library//eche-monitoring-guide_en.pdf), a new manual that aims to provide a set of agreed guidelines and examples of good practice in the area of ECHE compliance monitoring and enhancement. Higher education institutions applying for and participating in Erasmus+ projects are advised to consult this guide for information on priority areas of ECHE compliance, as well as on available tools, guidelines and web-links.

Violation of any of the ECHEs principles and commitments may lead to its withdrawal by the European Commission.

#### CONSORTIUM ACCREDITATION

A higher education national mobility consortium can support any of the four eligible mobility activities within a higher education mobility project.

The purpose of mobility consortia is to facilitate the organisation of mobility activities and to offer added value in terms of quality of activities compared to what each individual sending higher education institutions would be able to deliver alone. The member organisations of a national mobility consortium may pool or share services related to the organisation of mobility. Joint activities may include joint administrative, contractual and financial management of mobility, joint selection and/or preparation and mentoring of participants as well as, where relevant, a centralised point for finding enterprises and for matchmaking enterprises and participants. The national mobility consortium can also act as a facilitator for incoming student and staff trainees. This includes finding a receiving organisation in the region where the mobility consortium partners are located and providing assistance in case of need.

The consortium coordinator, possibly together with other/intermediary organisations, can play an active role in fostering contacts with enterprises and finding opportunities for traineeships and training places for staff, in promoting these activities and providing information, etc.

The consortium coordinator is invited to coordinate with consortia of other countries to increase the availability and quality of traineeships and to support Erasmus+ student traineeships.

Each sending HEI remains responsible for the quality, the contents and the recognition of the mobility periods. Each member of the consortium is required to sign an agreement with the consortium coordinator to specify the roles and responsibilities and the administrative and financial arrangements; the modalities of cooperation shall specify matters like the mechanisms for preparation, quality assurance and follow-up of mobility periods. Furthermore, each sending HEI is responsible for signing inter-institutional agreements (see following section) with HEIs that receive their students and staff.

The national mobility consortium can only get funding if it was awarded a consortium accreditation. If the assessment of the national mobility consortium is not successful, the consortium will have to reapply for the accreditation and for funding in the following year.

Compliance with the consortium accreditation shall be subject to the monitoring by the National Agency. Any major problems (e.g. misuse of funds, non-respect of obligations and weaknesses in the financial capacity) or any violation by the consortium of its commitments may lead to the withdrawal of the accreditation by the National Agency. The National Agency shall require the consortium coordinator to notify the National Agency without delay of any change in the composition, situation or status of the consortium which might necessitate changes to or withdrawal of the accreditation.

## b. INTER-INSTITUTIONAL AGREEMENT

Student mobility for studies and staff mobility for teaching between HEIs shall take place as part of an inter-institutional agreement between HEIs. The templates are available at http://ec.europa.eu/education/opportunities/higher-education/quality-framework_en.htm. Inter-institutional agreements can be signed by two or more HEIs.

This inter-institutional agreement, in the case of mobility between Programme Countries and Partner Countries, lays out the general principles that are adhered to in an ECHE and ensures that both or all sides will commit to implementing them.

The inter-institutional agreement may also be extended to cover student mobility for traineeships and/or staff mobility for training, relying on their partner institutions' knowledge of enterprises to identify receiving enterprises/organisations abroad.

## c. MOBILITY TOOL+

At the earliest once the participants are selected, the beneficiary organisation must encode general information regarding the participant and the type of mobility activity s/he will carry out (e.g. participant name, destination, duration of the mobility, etc.) into Mobility Tool+. The beneficiary organisation is also responsible for updating the Mobility Tool+ at least once a month during the lifetime of the mobility project with any new information regarding the participants and the mobility activities.

For mobility projects between Programme and Partner Countries, it will be necessary to identify the Partner Country HEIs within Mobility Tool+ via a PIC. If the Partner Country HEI does not already have a PIC based on prior participation in EU programmes, then they should register for one via the Participant Portal and communicate it to the beneficiary.

Mobility Tool+ will support the beneficiary in the management of the Erasmus+ mobility activities. Beneficiaries will be able to generate prefilled reports from Mobility Tool+ based on the information they have provided. Mobility Tool+ will also generate reports to be filled in by the participants in mobility activities.

## d. CONDITIONS OF PARTICIPATION OF STUDENTS

### SELECTION

Students apply to their HEI who carries out the selection of participants in the mobility action. The selection of students - as well as the procedure for awarding them a grant - must be fair, transparent, coherent and documented and shall be made available to all parties involved in the selection process.

The HEI shall take the necessary measures to prevent any conflict of interest with regard to persons who may be invited to take part in the selection bodies or process of students' selection.

The selection criteria - such as for example: the academic performance of the candidate, the previous mobility experiences, the motivation, the previous experience in the receiving country (i.e. return to country of origin) etc. - shall be made public. For students from Partner Countries, the first criterion for selecting students will be academic merit, but with equivalent academic level, preference should be assigned to students from less advantaged socio-economic backgrounds (including refugees, asylum seekers and migrants).

Lower priority will be given to those who have already participated in mobility actions in the same study cycle under the LLP-Erasmus Programme, Erasmus Mundus Programme or Erasmus+ Programme. In the case of Erasmus Mundus Master Courses and Erasmus Mundus Joint Master Degrees, previous participation is only taken into account for scholarship holders.

Once students are selected, they should receive from their sending institution the Erasmus+ Student Charter, setting out the student's rights and obligations with respect to her/his period of study or traineeship abroad, and explaining the different steps to be undertaken before, during and after mobility.

### AGREEMENT WITH THE STUDENT

Prior to their departure, each selected student must sign an agreement which includes also a "learning agreement" setting out the programme of studies and/or traineeship to be followed, as agreed by the student, the sending and the receiving organisation. The template is available at http://ec.europa.eu/education/opportunities/higher-education/quality-framework_en.htm. This learning agreement defines the target learning outcomes for the learning period abroad and specifies the formal recognition provisions. The agreement also specifies the location of the study period and/or traineeship. In this learning agreement, the sending institution and the student should also agree on the language level (main language of instruction or workplace) to be reached by the student by the start of the study/traineeships period, in line with the recommended level specified in the inter-institutional agreement between sending and receiving institutions (or in line with the enterprise expectations in case of traineeships). Where applicable, the sending institution and the student will agree on the best suited linguistic support to be provided, so that the student can reach the agreed level (see next paragraph on online service for linguistic support).

### GRANT FOR STUDENTS

Students may receive a "student grant" to contribute to the increased costs that the mobility period abroad generates. Such grant may consist of one or both of the following:

- an EU grant, calculated per month and paid as a unit cost (see the "funding rules" section in Part B of this Guide); and/or
- a national, regional and local grant provided by a public or private donor, or loan scheme.

Students with a zero-grant from EU funds are allowed (both for study and traineeship mobility), i.e. students who fulfil all Erasmus student eligibility criteria and benefit from all advantages of being an Erasmus student without receiving an EU mobility grant. The rules stated in this Programme Guide, except those relating to the allocation of grants, also apply to such students with a zero-grant from EU funds. The number of students with a zero-grant from EU funds for the entire mobility period counts in the statistics for the performance indicator used to allocate the EU budget between the countries.

Students taking part in a higher education mobility project supported by the Erasmus+ Programme - whether or not they receive an Erasmus+ EU grant for their participation - are exempted from paying fees for tuition, registration, examinations and access to laboratory and library facilities at the receiving institution. However, small fees may be charged for costs such as insurance, student unions and the use of miscellaneous material such as photocopies, laboratory products, on the same basis as these are charged to local students. Outbound students shall not be liable to any additional fees or charges in connection with the organisation or administration of their mobility period.

In addition, the entitlement to any grant or loan awarded to students to study in their sending institution must be maintained during the period abroad.

In the case of traineeships, if the receiving enterprise/organisation grants the student an allowance or any kind of remuneration, it is compatible with the Erasmus+ EU grant.

A mobility period is compatible with a part-time job and, if the student receives an Erasmus+ EU grant, it is compatible as well with the revenue that the student would receive as long as he or she carries the activities foreseen in the agreed mobility programme.

Students taking part in a higher education mobility project (either studying or doing a traineeship abroad) cannot be at the same time beneficiaries of an Erasmus Mundus Joint Master Degree scholarship, and vice versa.

Students that receive an Erasmus+ EU grant will fully or partially reimburse the EU grant if they do not comply with the terms of the grant agreement (unless they were prevented from completing their planned activities abroad due to a case of force majeure). They may be asked to partially or fully reimburse the EU grant received if they fail to complete and submit the final online report.

### ONLINE LINGUISTIC SUPPORT

By signing the Erasmus Charter for Higher Education, HEIs commit to provide all the necessary support to participants in mobility activities in terms of linguistic preparation. In this regard, an online linguistic support will be gradually implemented in the course of the Programme for all mobility activities between Programme Countries lasting two months and longer. Such online support is made available by the European Commission to selected students, with a view to assess their competence in the language they will use to study or carry out their traineeships abroad. This tool will also offer them, where necessary, the possibility to improve the knowledge of the language before and/or during the mobility period. Participants with a level of at least B2 in the main language of instruction or work may choose to follow an OLS course in the language of the receiving country, if available. The provision of linguistic support shall be based on mutual trust between

sending and receiving institutions. The recommended level of language competence is stated in the Inter-institutional agreements and the Learning agreements, and thus agreed upon by the three parties. With Erasmus+, sending HEIs commit themselves to ensure that their outgoing students have the requested language level, and such mutual agreement should be sufficient. Sending higher education institutions are responsible for providing their students with the most appropriate linguistic support, be it through OLS or any other approach that can be funded through the organisational support, to ensure that their students get the recommended level agreed with the receiving institution by the start of the mobility. Therefore, sending HEIs are not required to send the results of the OLS language assessment to the receiving institutions. It is up to the students to decide whether they agree to disclose the results of their OLS language assessment to the receiving institution or not.

The online linguistic support will be provided as follows:

- National Agencies allocate online licences to higher education institutions according to general criteria specified by the European Commission;
- once selected by their higher education institution all students (except native speakers and in duly justified cases) benefiting from the online service must carry out an online test to assess their competences in the main language they will use for studying or doing the traineeship abroad. This is a pre-requisite before leaving on mobility. The results of this test will be communicated to the student and to the sending HEI. This will allow the sending HEI to quantify the number of students that will potentially need an online language course;
- based on the number of online licences available for language courses, HEIs will distribute licences according to student needs. The students will assume the responsibility of following the online course, as described and agreed in the grant agreement;
- at the end of the mobility period, the student will carry out a second assessment to measure the progress made in the language. The results will be communicated to the student and to the sending HEI.

Further details are made available on the websites of the European Commission and National Agencies.

For all other types of mobility, or if the Commission's online service is not available for a given language, higher education institutions may provide other types of linguistic support to students, to be funded under the "organisational support" grant.

## e. CONDITIONS OF PARTICIPATION OF STAFF

### SELECTION

Staff taking part in a higher education mobility project must be selected by their sending HEI in a fair and transparent way. Prior to their departure, they must have agreed on a mobility programme with the sending and receiving institutions/enterprise.
The selection of teachers and HEI staff shall be carried out by the HEI. The selection and grant award procedure must be fair, transparent, coherent and documented and shall be made available to all parties involved in the selection process. The selection criteria (for example priority given to staff going abroad for the first time, limitation on the possible number of mobility activities per staff member during a given time period, etc.) shall be made public.

The HEI shall take the necessary measures to prevent any conflict of interest with regard to persons who may be invited to take part in the selection bodies or selection process of individual beneficiaries.

In the case of a mobility of staff from an enterprise to an HEI, it shall be arranged by an invitation of the institution to the staff member of the enterprise; the grant is managed by the receiving HEI or, in the case of mobility between Programme and Partner Countries, the beneficiary.

### MOBILITY AGREEMENT

The selection of the HEI's staff will be made by the sending institution on the basis of a draft mobility programme submitted by the staff member after consultation with the receiving institution/enterprise. Prior to departure, the final mobility programme shall be formally agreed by both the sending institution/enterprise and the receiving institution/enterprise (by exchange of letters or electronic messages).

Both the sending institution/enterprise and receiving institution/enterprise shall be responsible for the quality of the mobility period abroad.

### GRANT FOR STAFF

The financial rules for the two types of staff mobility are the same. The grant is a contribution to the travel and subsistence costs for a period of teaching or training abroad (see the "funding rules" section in Part B of this Guide).

Mobility with a zero-grant from EU funds is allowed for higher education staff.

# 2. During Mobility

### Interruption of students' mobility

When a mobility period of a student is interrupted, for example because there is a gap between the end of a language course and the start of the actual study/traineeship, the number of days of interruption shall be encoded in Mobility Tool+ and the grant amount adapted accordingly.

For traineeship between Programme Countries, the period of mobility abroad may be interrupted by the enterprise holidays if the enterprise is closed during this period. The grant is maintained during this period. The closure period does not count towards the minimum duration of a traineeship period but it will count towards the maximum of 12 months per each cycle of study for which the same student may receive grants for mobility periods.

### Prolongation of students' mobility

A prolongation of an on-going mobility period may be agreed between the sending and the receiving organisations subject to the following:

- the request for prolongation of the mobility period must be introduced at the latest one month before the end of the mobility period initially planned;
- if the request is accepted by all parties, the grant agreement must be amended and all the arrangements related to the prolongation of the duration must be completed;
- if the student receives an Erasmus+ grant, the sending institution may either amend the grant amount to take into account the longer duration, or reach an agreement with the student that the additional days are considered "zero-grant from EU funds" period;
- the actual start and end dates of the mobility period shall be included in the receiving institution's Transcript of Records or in the student's Traineeship Certificate according to the following definitions:
    - the start date should be the first day that the student needs to be present at the receiving organisation (for example, this could be the start date of the first course/first day at work, a welcoming event organised by the receiving institution, or language and intercultural courses);
    - the end date should be the last day the student needs to be present at the receiving organisation (for example, this could be the last day of the exam period/course/work/mandatory sitting period).
- the actual duration defined as indicated above is the period to be indicated by the HEIs in their final reports and is the maximum number of months to be covered through the EU grant. When the prolongation of the student's mobility is considered as “zero-grant from EU funds” days, these days shall be deducted from the total duration of the mobility period to calculate the final grant amount;
- the additional period must follow immediately after the on-going mobility period. There can be no gaps (holidays and university/enterprise closures are not considered "gaps") unless duly justified and approved by the National Agency.

# 3. After Mobility

## a. Recognition of learning outcomes

At the end of the period abroad, the receiving institution/enterprise must provide the student and his HEI with a transcript of records or traineeship certificate ('transcript of work') confirming the results of the agreed programme.

The follow-up to the mobility period includes formal recognition, by the sending institution, of the credits awarded abroad for formal learning of newly acquired competences (using ECTS credits or an equivalent system) including for traineeships, where applicable, and the documentation of outcomes resulting from non-formal and informal learning outside the classroom or workplace (using the Diploma Supplement). However this does not apply for traineeships carried out by recent graduate students.

The results of language assessment and online language courses will be reported centrally but will not provide any formal qualification.

As regards staff mobility, the sending institutions should ensure that the learning outcomes of participating staff are properly recognised, disseminated and widely used within the institution.

## b. REPORTING

At the end of the period abroad, all students and staff who have undertaken a mobility activity are required to complete and submit a final report. For mobility activities lasting two months or more, the report also includes a qualitative evaluation of the linguistic support received during the mobility period.
Those students and staff who fail to submit the report may be required by their sending HEI to partially or fully reimburse the EU grant received. Reimbursement shall not be requested when a student or staff member has been prevented from completing her/his planned activities abroad due to a case of force majeure. Such cases shall be reported by the beneficiary and be subject to the written acceptance by the NA.

# MOBILITY PROJECT FOR VET LEARNERS AND STAFF

## 1. ORGANISATIONAL SUPPORT

The organisational support grant is a contribution to any costs incurred by the organisations in relation to activities to support student and staff mobility of high quality. For example:

- providing information and assistance to students and staff;
- selecting students and staff;
- preparing the learning agreements to ensure full recognition of the students' educational components; preparation and recognition of mobility agreements for staff;
- providing linguistic and intercultural preparation to both students and staff – especially sector-specific language courses for VET;
- general management around setting up and managing mobility project;
- ensuring an efficient mentoring and supervision arrangements of mobile participants;
- specific arrangements to ensure the quality of traineeships in enterprises.

The quality of the implementation and follow-up of the project by the institution will be taken into account when the final grant is decided. The quality implementation of the mobility project should follow the guidelines set out in this Annex on the Mobility for VET learners and staff.

## 2. BEFORE MOBILITY

### a. ACCREDITATION OF PARTICIPATING ORGANISATIONS – THE ERASMUS+ VET MOBILITY CHARTER

From 2015 onwards there is the possibility for non-accredited organisations to apply for the Erasmus+ VET Mobility Charter through separate yearly calls launched by the National Agencies, provided that those organisations fulfil the prerequisite selection criteria and demonstrate the quality and sustainability of their internationalisation strategies. Please take good note that if organisations do acquire a new Erasmus+ VET Mobility Charter in a given year, they will only be able to use it for undertaking VET mobility from the following General Call onwards. For example, if organisations apply for a Charter under a specific call and this Charter is awarded in 2016, they will still have to apply at the same time for a VET mobility project without a Charter if they wish to carry out mobility under the 2016 General Call. They would only be able to use the Charter in the following call year (in this example 2017).

More detailed information is made available on the websites of the European Commission and National Agencies.

### b. EUROPEAN QUALITY CHARTER FOR MOBILITY

VET organisations that plan to organise mobility activities for VET learners and staff must organise their activities in line with the principles and criteria set out in the European Quality Charter for Mobility[238].

The European Quality Charter for Mobility constitutes the quality reference document for education and training stays abroad. The Charter provides guidance on mobility arrangements for learning or other purposes, such as professional betterment, to both young learners and staff. The respect of the principles set out in the Charter should help to ensure that mobility participants always have a positive experience both in the host country and in their country of origin on their return, and that the number and depth of education and training exchanges are stepped up. The Charter is available at:
http://europa.eu/legislation_summaries/education_training_youth/lifelong_learning/c11085_en.htm

### c. ECVET - MEMORANDA OF UNDERSTANDING

VET organisations may decide to apply the European Credit system for Vocational Education and Training (ECVET) in the framework of their mobility activities (for more information, see below). In these cases, a precondition for using ECVET is the setting up of an ECVET partnership. This partnership needs to bring together the competent organisations involved in 1) identifying the suitable learning outcomes during mobility activities; 2) delivering VET programmes that are apt at satisfying

238 Recommendation (EC) No 2006/961 of the European Parliament and of the Council of 18 December 2006 on transnational mobility within the Community for education and training purposes: European Quality Charter for Mobility (Official Journal L 394 of 30.12.2006).

these needs; 3) assessing the extent to which learning outcomes have been achieved by learners; and 4) validating and recognising learners' credits on their return to the home institution.

The partnership for ECVET mobility activities can be formalised through a Memorandum of Understanding (MoU).
A MoU is an agreement between competent organisations which sets the framework for credit transfer. It formalises the ECVET partnership by stating the mutual acceptance of the status and procedures of competent organisations and institutions involved. It also establishes partnerships' procedures for cooperation.
MoUs can be developed by networks of competent organisation/institutions from several countries/systems, but they can also be bilateral, depending on the partnership needs and ambitions. For more information and guidance on the establishment of a MoU please refer to the ECVET User's Guide available on the website of the European Commission or refer to the following links: http://ec.europa.eu/education/policy/vocational-policy/ecvet_en.htm and http://www.ecvet-secretariat.eu

## d. MOBILITY CONSORTIUM

Besides VET providers applying as a single organisation, a national mobility consortium can also apply for a VET mobility project.

The purpose of mobility consortia is to facilitate the organisation of mobility activities and to offer added value in terms of quality of activities compared to what each individual sending VET institution (eg VET school) would be able to deliver alone. The member organisations of a national mobility consortium are expected to pool or share services related to the organisation of mobility and develop their internationalisation together through mutual cooperation and sharing of contacts. Joint activities include typically joint administrative, contractual and financial management of mobility, joint selection and/or preparation and mentoring of participants as well as, where relevant, a centralised point for finding enterprises and for matchmaking enterprises and participants. The national mobility consortium can also act as a facilitator for incoming trainees and staff. This includes finding a receiving organisation in the region where the national mobility consortium partners are located and providing assistance in case of need.

The consortium coordinator, possibly together with other/intermediary organisations, has to play an active role in fostering contacts with enterprises and finding opportunities for traineeships and training places for staff, in promoting these activities and providing information, etc.

Each sending VET organisation remains responsible for the quality, the contents and the recognition of the mobility periods. Each member of the consortium is required to sign an agreement with the consortium coordinator to specify the roles and responsibilities and the administrative and financial arrangements; the modalities of cooperation shall specify matters like the mechanisms for preparation, quality assurance and follow-up of mobility periods.

## e. EUROPEAN DEVELOPMENT PLAN

The European Development Plan concerns only applications from applicants that do not possess the Erasmus+ VET Mobility Charter. Although non-Charter holders are not expected to be aiming for internationalisation or sustainability to the same degree as those organisations that have been accredited with the Charter, nevertheless they are expected to already be reflecting on the impact of mobility on their respective organisations beyond the mere mobility itself. Before applying, a VET provider or a national mobility consortium coordinator must develop a European Development Plan; this plan is part of the application form. This section indicates how the planned mobility activities are inscribed in a wider and long-term strategy of development and modernisation of the VET providers involved in the project.

This European Development Plan will be an important part of the evaluation of grant applications and should provide information on:

- the needs of the VET providers in terms of quality development and internationalisation (e.g. as regards management competences, staff competences, new teaching methods or tools, European dimension, language competences, curriculum, organisation of teaching, training and learning, reinforcing links with partner institutions) and how the planned activities will contribute to meeting these needs;
- the impact expected on learners, teachers, trainers and other staff, and on the VET provider overall;
- the way VET schools and companies will integrate the competences and experiences acquired by their staff into their curriculum and/or their development plan;
- the way work-based learning can be enhanced sustainably through transnational cooperation.

## f. MOBILITY TOOL+

At the earliest when the participants are selected, the beneficiary organisation must encode general information regarding the participant and the type of mobility activity s/he will carry out (e.g. participant name, destination, duration of the mobility, etc.) into Mobility Tool+. The beneficiary organisation is also responsible for updating Mobility Tool+ with any change occurred to participants or activities during the lifetime of the mobility project. Beneficiaries will be able to generate prefilled reports from Mobility Tool+ based on the information they have provided. Mobility Tool+ will also generate reports to be filled in by the participants in mobility activities.

More information about Mobility Tool+ and how to access it will be provided in the grant agreement between the National Agency and the beneficiary.

## g. CONDITIONS OF PARTICIPATION OF VET LEARNERS

### SELECTION

The sending organisation carries out the selection of participants in the mobility activity. The selection of learners - as well as the procedure for awarding them a grant - must be fair, transparent, coherent and documented and shall be made available to all parties involved in the selection process.

The sending organisation shall take the necessary measures to prevent any conflict of interest with regard to persons who may be invited to take part in the selection bodies or selection process of individual participants.

### ACCOMPANYING PERSONS

VET learners with special needs or disadvantaged backgrounds may be accompanied by a person that will support them during the mobility period. The involvement of the accompanying person should be proportional to the number of learners involved (usually one accompanying person per group of learners carrying out a traineeship in the same receiving organisation).

The duration of the stay abroad of accompanying persons should also be proportional to the needs of the learners (usually a stay for the whole duration of the activity is accepted only in cases where the learners are not autonomous or minors).

### AGREEMENT WITH THE LEARNER

Prior to their departure, VET learners must sign an agreement with the sending and receiving organisation which includes also the following:

- a "learning agreement" setting out the programme of training to be followed, as agreed by the learner, the sending and the receiving organisation. This agreement defines the target learning outcomes for the learning period abroad, specifies the formal recognition provisions (e.g. ECVET);
- a "Quality Commitment", annexed to the learning agreement, showing the rights and obligations of the trainees, the sending and receiving organisations and, when relevant, intermediary organisations.

When signing the learning agreement, VET learners are entitled to receive a grant to support them during the period of traineeship abroad. Such grant may consist of one or both of the following:

- an EU grant, calculated per day of activity (see the "funding rules" section in Part B of this Guide); and/or
- a local, regional and national grant provided by a public or private donor, or loan scheme.

"Zero-grant VET learners" are allowed, (i.e. learners who carry out traineeships which respect the Erasmus+ VET mobility criteria and benefit from the advantages of being an Erasmus+ learner without receiving an Erasmus+ mobility grant). The rules stated in this Programme Guide, except those relating to the allocation of grants, also apply to such "zero-grant VET learners".

### ONLINE LINGUISTIC SUPPORT

VET learners undertaking a mobility activity lasting 19 days or longer are eligible to receive linguistic support prior to departure or during the mobility activity. In this regard, the Commission makes available an online service for selected VET learners, with a view to assess their competence in the language they will use to carry out their traineeships abroad. This service also offers them, where necessary, the possibility to improve the knowledge of the language before and/or during

the mobility period. Participants with a level of at least B2 in the main language of work may choose to follow an OLS course in the language of the receiving country, if available. Such an online service will be gradually implemented in the course of the Programme. The linguistic support is provided as follows:

- at the time of applying for a VET mobility project, the applicant organisation will estimate the need for linguistic support - in the main language of instruction or work - of the learners undertaking a traineeship in the framework of the mobility project;
- National Agencies allocate online licences to beneficiary organisations according to general criteria specified by the Commission;
- once selected by their sending organisation - and before signing their learning agreement - all learners (except native speakers) benefiting from the online service will carry out an online test to assess their competences in the selected language. The results of this test will be communicated to the learner and, upon request, to the sending organisation. These results will not have any influence on the possibility for the learner to go abroad;
- based on the number of online licences available for language courses, those participants who need linguistic support may be offered the possibility to follow an online language course;
- at the end of their traineeship, VET learners will carry out a second assessment to measure the progress made in the language. The results will be communicated to the student and, upon request, to the sending organisation.

In the initial stages of the Programme, the online assessment and courses will not be provided in all EU languages and language courses may not be available for all participants requesting them. Further details will be made available at the websites of the Commission and National Agencies.

For languages not covered by the Commission's service, linguistic support must be arranged by the participating organisations in the VET mobility project; a specific grant for "linguistic support" may be provided for that purpose. Furthermore, organisations involved in a VET mobility project can use the "organisational support" grant to address the needs of participants in terms of pedagogical, intercultural or specific linguistic preparation (see the "funding rules" section in Part B of this Guide).

### h. Conditions of participation of staff

#### Selection

The selection of staff shall be carried out by the sending organisation. The selection and grant award procedure must be fair, transparent, coherent and documented and shall be made available to all parties involved in the selection process.

The sending organisation shall take the necessary measures to prevent any conflict of interest with regard to persons who may be invited to take part in the selection bodies or selection process of individual beneficiaries.

The selection criteria (priority given to staff going abroad for the first time, limitation on the possible number of mobility activities per staff member during a given time period, etc.) shall be made public.

#### Mobility agreement

The selection of the staff will be made by the sending organisation on the basis of a draft mobility programme submitted by the staff member after consultation with the receiving institution or enterprise/organisation. Prior to departure, the final mobility programme shall be formally agreed by both the sending and receiving organisations by exchange of letters or electronic messages.

Both the sending and the receiving organisations shall be responsible for the quality of the mobility period abroad.

## 3. During Mobility

### Interruption of leaners' mobility

For traineeships, the period of mobility abroad may be interrupted by the enterprise holidays if the enterprise is closed during this period. The grant is maintained during this period. The closure period does not count towards the minimum duration of a traineeship period.

### PROLONGATION OF LEARNERS' MOBILITY

A prolongation of an on-going mobility period may be agreed between the sending and the receiving organisations subject to the following:

- before the end of the mobility period initially planned, the grant agreement must be amended and all the arrangements relating to the prolongation of the duration must be completed. Such amendment is particularly important in those cases where the prolongation also determines a request of extension of the monthly EU grant. In fact, although the duration of the mobility period shall be defined in the student's Certificate of Attendance (this is the period indicated by the beneficiary organisations in their final reports), the maximum number of months to be covered through the EU grant shall be the one set out in the mobility agreement or its amendment(s). This will be the case, even if the duration indicated in the learning agreement is shorter than the one indicated in the Certificate of Attendance;

- the additional period must follow immediately after the on-going mobility period. There can be no gaps (holidays and VET school/enterprise closures are not considered "gaps") unless duly justified and approved by the National Agency.

# 4. AFTER MOBILITY

## a. RECOGNITION OF LEARNING OUTCOMES

The sending and receiving organisations involved should agree on issuing a Europass Mobility certificate at the end of the mobility. For more information on how to proceed, consult the Europass website:
http://europass.cedefop.europa.eu/en/home.

The results of language assessment and online language courses will be reported centrally but will not provide any formal qualification.

### ECVET

VET organisations may decide to apply the ECVET system in the framework of their mobility activities. ECVET is a common methodological framework that facilitates the accumulation and transfer of credits for learning outcomes from one qualifications system to another. It aims to promote transnational mobility and access to lifelong learning. It is not intended to replace national qualification systems, but to achieve better comparability and compatibility among them. ECVET applies to all outcomes obtained by an individual from various education and training pathways that are then transferred, recognised and accumulated in view of achieving a qualification. This initiative makes it easier for European citizens to gain recognition of their training, skills and knowledge in another Programme Country. More information about ECVET can be found on the Commission's website at:
http://ec.europa.eu/education/policy/vocational-policy/ecvet_en.htm and http://www.ecvet-secretariat.eu
When ECVET is used, the credits accrued for learning outcomes acquired should be made transparent and should be specified in the Memorandum of Understanding between the participating organisations.

## b. REPORTING

At the end of the period abroad, all VET learners and staff who have undertaken a mobility activity are required to complete and submit a final report. For mobility activities lasting 19 days or more, the report also includes a qualitative evaluation of the linguistic support received during the mobility period.

Those students and staff who fail to submit the report may be required to partially or fully reimburse the EU grant received. Reimbursement shall not be requested when a learner or staff member has been prevented from completing her/his planned activities abroad due to a case of force majeure. Such cases shall be reported by the sending organisation and be subject to the written acceptance by the National Agency.

# MOBILITY PROJECT FOR SCHOOL EDUCATION STAFF

Mobility projects allow schools to give their teachers and other educational staff opportunities and incentives to acquire new competences linked to the needs of the school. School management should play an active role in planning, supporting and following up the mobility project.

In order to ensure and maximise the impact of these activities on professional development of all staff, schools should make sure that after the mobility the competences acquired by their staff are well disseminated across the school and integrated into the school teaching practice.

Before applying, schools should carefully think about how many of staff can realistically participate within the duration of the project (i.e. 1 or 2 years), what kind of activities they would engage in and how these activities could be effectively followed-up at home. At application stage, applicant organisations will need to provide indicative numbers, types and destination countries of planned mobility activities.

If the National Agency selects the mobility project and confirms the budget requested, the beneficiary can start the selection of participants and the detailed organisation of the activities.

## 1. ORGANISATIONAL SUPPORT

The organisational support grant is a contribution to costs incurred by the institutions in relation to activities in support of staff mobility. For example:

- preparation and follow-up of the European Development Plan;
- organisational arrangements with partner institutions (mainly in case of job-shadowing and teaching assignments);
- providing information and assistance to staff;
- selection of staff for mobility activities;
- preparation of mobility agreements to ensure the quality and recognition of mobility activities;
- linguistic and intercultural preparation for mobile staff;
- facilitating the integration of incoming mobile staff in the school;
- ensuring efficient mentoring and supervision arrangements of mobile participants;
- supporting the reintegration of mobile participants and building on their acquired new competences for the benefit of the school, teaching staff and pupils.

## 2. BEFORE MOBILITY

### a. EUROPEAN DEVELOPMENT PLAN

Before applying, a school or a national mobility consortium coordinator must develop a European Development Plan; this plan is part of the application form. This section indicates how the planned mobility activities are inscribed in a wider and long-term strategy of development and modernisation of the school(s) involved in the project.

This European Development Plan will be an important part of the evaluation of grant applications and should provide information on:

- the needs of the school(s) in terms of quality development and internationalisation (e.g. as regards management competences, staff competences, new teaching methods or tools, European dimension, language competences, curriculum, organisation of teaching, training and learning, reinforcing links with partner institutions) and how the planned activities will contribute to meeting these needs;
- the impact expected on pupils, teachers and other staff, and on the school overall;
- the way schools will integrate the competences and experiences acquired by their staff into their curriculum and/or the school development plan;
- the way eTwinning is going to be used in connection with the planned mobility activities, if relevant (see the section below).

### b. ETWINNING

eTwinning promotes school collaboration and school networking in Europe through the use of Information and Communication Technologies (ICT). It provides advice, ideas and tools to make it easy for schools to set up partnerships and start collaborative projects in any subject area.

In connection with a mobility project, eTwinning allows to:

- find potential partners/receiving organisations abroad and work together with them before applying for funding, in order to improve the quality and impact of the planned projects;
- use the available project tools to implement more strategic projects and better exploit the inputs from partners;
- prepare the outgoing staff, for instance through communication with the receiving organisation (learning more about the receiving country and receiving organisation, discussing and agreeing on activities to carry out), participate in online learning events related to their mobility;
- cooperate intensively among all schools involved during and after the staff mobility project.

No formal application is required to use eTwinning, all schools need to do is register in the eTwinning portal: http://www.etwinning.net.The European eTwinning portal is a fully multilingual website offering collaboration tools and services through which teachers register, find partners and work together with them. It also serves as a meeting point where all interested teachers can share resources, discuss and find partner schools.

eTwinning assists schools both at European level, through the Central Support Service, and at national level, through the National Support Services. All teachers can benefit from the services, training, recognition and tools provided by the eTwinning national and European Support Services. For more information about these Services, see the section "What other bodies are involved in the implementation of the Programme?" in Part A of this Guide.

## C. CONDITIONS OF PARTICIPATION OF STAFF

### SELECTION

The sending school is responsible for selecting the staff undertaking mobility activities. The selection process must be fair, transparent, coherent and documented and shall be made available to all parties involved. The profile of participants must correspond to the eligibility criteria set out in part B of this guide. The sending school should define the selection procedure, i.e. how staff will be invited to apply, the documentation that the applicants need to submit and how it will be treated.

The school should define the criteria to be considered in the selection process. General criteria might be: motivation, clear goals for the mobility, willingness to share the experience upon return. It is strongly recommended to form a selection committee, which could also involve external people, rather than letting one staff member take the decision alone.

In addition to these general criteria, there may be specific criteria linked to the nature or purpose of the mobility project (i.e. relevance of the activities planned by an individual staff member to the needs of the school and other criteria defined by the school).

Both the general and the specific criteria must be agreed and shared by all those involved in the selection process and should be clearly communicated to the applicants. Sharing or discussing selection criteria and their rationale with the receiving organisation may facilitate preparation of the activities. There should be a written record of the selection process in case of possible internal complaints.

### MOBILITY AGREEMENT

When the participant is selected, s/he should, with the help of the sending school (and the partner organisation if the mobility is a teaching assignment or a job-shadowing) formally agree on the type of training to be undertaken and its content, clarify how s/he will prepare for this training, how the knowledge/competences acquired will be disseminated across the school and outside, and what will be the benefits of participation at institutional and individual level. They should also agree how the training will be evaluated and recognised by the sending school. This agreement should be established before the start of a mobility activity. Its main aim is that the sending school, the receiving organisation and the participant clarify expectations and ensure that the stay abroad is meaningful.

### MOBILITY TOOL+

At the earliest when the participants are selected, the beneficiary organisation must encode general information regarding the participant and the type of mobility activity s/he will carry out (e.g. participant name, destination, duration of the mobility, etc.) into Mobility Tool+. Mobility Tool+ will support the beneficiary in the management of the Erasmus+ mobility activities. The beneficiary organisation is also responsible for updating Mobility Tool+ with any change occurred to participants or activities during the lifetime of the mobility project. Beneficiaries will be able to generate prefilled reports from Mobility Tool+ based on the information they have provided. Mobility Tool+ will also generate reports to be filled in by the participants in mobility activities. More information about Mobility Tool+ and how to access it will be provided in the grant agreement between the National Agency and the beneficiary.

# 3. AFTER MOBILITY

## a. RECOGNITION OF LEARNING OUTCOMES

The sending and receiving organisations involved should agree on issuing a Europass Mobility certificate at the end of the mobility. For more information on how to proceed, consult the Europass website: http://europass.cedefop.europa.eu/en/home.

## b. REPORTING

At the end of the period abroad, all staff members who have undertaken a mobility activity are required to complete and submit a final report. Those who fail to submit the report may be required to partially or fully reimburse the EU grant received. Reimbursement shall not be requested when a staff member has been prevented from completing her/his planned activities abroad due to a case of force majeure. Such cases shall be reported by the sending school or national mobility consortium coordinator and be subject to written acceptance by the National Agency.

# MOBILITY PROJECT FOR ADULT EDUCATION STAFF

Learning mobility for adult education staff aims at raising the key competences and skills of staff in adult education in order to increase the quality of teaching and learning in all forms and to make them relevant to the needs of the labour market and society at large. Particular attention will be given to projects addressing the teaching/learning needs of disadvantaged adult learners (including refugees, asylum seekers and migrants). It is expected that adult education organisations use learning mobility of their staff strategically and in terms of internationalising their organisation and of raising the capacity of it.

## 1. ORGANISATIONAL SUPPORT

The organisational support grant is a contribution to costs incurred by the organisations in relation to activities of staff mobility. The purpose of the grant is to facilitate the organisation of high quality mobility activities with a view to raising the capacity of the adult education organisations. For example:

- preparation and follow-up of the European Development Plan;
- providing information and assistance to staff;
- selection of staff for mobility activities;
- organisational arrangements with partner institutions (in particular in case of job-shadowing and teaching assignments);
- preparation of mobility agreements to ensure the quality and recognition of mobility activities
- linguistic and intercultural preparation for mobile staff;
- ensuring efficient mentoring and supervision arrangements of mobile staff;
- supporting the reintegration of mobile participants and building on their acquired new competences to improve the quality of teaching and learning provisions of the adult education organisation.

The quality of the implementation and follow-up of the project by the organisation will be taken into account when the final grant is decided. The quality implementation of the mobility project should follow the guidelines set out in this Annex on Mobility for adult education staff.

## 2. BEFORE MOBILITY

### a. EUROPEAN DEVELOPMENT PLAN

Before applying, an adult education organisation must develop a European Development Plan; this plan is part of the application form. This section indicates how the planned mobility activities are inscribed in a wider and long-term strategy of development and modernisation of the organisation.
This European Development Plan will be an important part of the evaluation of grant applications and should provide information on:

- the needs of the organisation in terms of quality development and internationalisation (e.g. as regards management competences, staff competences, new teaching/learning methods or tools, European dimension, language competences, curriculum, organisation of teaching, training and learning, reinforcing links with partner organisations) and how the planned activities will contribute to meeting these needs;
- the impact expected on adult learners, teachers, trainers and other staff, and on the organisation overall;
- the way the organisation will integrate the competences acquired by its staff into their curriculum and/or the organisation's development plan.

The purpose of the European Development Plan is to ensure that the planned activities are relevant both for the individual participants and for the organisation as a whole, as they will have a higher impact on the quality of teaching and learning if they are well integrated in the organisation's strategic development.

### b. MOBILITY TOOL+

At the earliest when the participants are selected, the beneficiary organisation must encode general information regarding the participant and the type of mobility activity s/he will carry out (e.g. participant name, destination, duration of the mobility, etc.) into the Mobility Tool+. The Mobility Tool+ will support the beneficiary in the management of the Erasmus+ mobility activities. The beneficiary organisation is also responsible for updating the Mobility Tool+ with any change occurred to participants or activities during the lifetime of the mobility project. Beneficiaries will be able to generate prefilled reports from the Mobility Tool+ based on the information they have provided. The Mobility Tool+ will also generate reports to be filled in by the participants in mobility activities.

More information about the Mobility Tool+ and how to access it will be provided in the grant agreement between the National Agency and the beneficiary.

### c. CONDITIONS OF PARTICIPATION OF STAFF

#### SELECTION

The selection of staff shall be carried out by the sending organisation. The selection and grant award procedure must be fair, transparent, coherent and documented and shall be made available to all parties involved in the selection process.

The sending organisation shall take the necessary measures to prevent any conflict of interest with regard to persons who may be invited to take part in the selection bodies or selection process of individual participants.

#### MOBILITY AGREEMENT

It is recommended that the sending and receiving organisation, together with the participants, agree on the activities undertaken by staff members prior to the start of the mobility period by exchange of letters or electronic messages. This agreement will define the target learning outcomes for the period abroad, specify the recognition provisions and list the rights and obligations of each party.

Both the sending and the receiving organisations shall be responsible for the quality of the mobility period abroad.

## 3. AFTER MOBILITY

### a. RECOGNITION OF LEARNING OUTCOMES

The sending and receiving organisations involved should agree on issuing a Europass Mobility certificate at the end of the mobility. For more information on how to proceed, consult the Europass website: http://europass.cedefop.europa.eu/en/home.

### b. REPORTING

At the end of the period abroad, all staff members who have undertaken a mobility activity are required to complete and submit a final participant's report. Those who fail to submit the report may be required to partially or fully reimburse the EU grant received. Reimbursement shall not be requested when a staff member has been prevented from completing her/his planned activities abroad due to a case of force majeure. Such cases shall be reported by the sending organisation and be subject to the written acceptance by the National Agency.

# MOBILITY PROJECT FOR YOUNG PEOPLE AND YOUTH WORKERS

The Actions supported by the Erasmus+ Programme in the field of youth provide many opportunities for young people to acquire competences and grow as individuals, through non-formal and informal learning.

Non-formal learning refers to the learning which takes place outside formal educational curriculum. It has a participative and learner-centred approach; it is carried out by learners on a voluntary basis and therefore is closely linked to young people's needs, aspirations and interests. By providing an additional source and new forms of learning, such activities are also important means to improve the attainment in formal education and training as well as to address young NEETs (i.e. young people not in employment, education or training) or young people with fewer opportunities and combat social exclusion.

Informal learning refers to the learning in daily life activities, in work, with peers, etc. It is mainly learning by doing. In the youth sector, informal learning can take place in youth initiatives, in peer group discussions, through voluntary activities and in a variety of other situations.

Non-formal and informal learning enable young people to acquire essential competences that contribute to their personal and socio-educational development and foster their active participation in society, thereby improving their employment prospects. Learning activities within the youth field are meant to have a significantly positive impact on young people as well as on the organisations involved, the communities in which these activities take place, the youth field itself and the European economic and societal sectors at large.

A high-quality non-formal and informal learning dimension is a key aspect of all youth projects supported under the Erasmus+ Programme. Youth projects funded by the Erasmus+ Programme must adhere to the following non-formal and informal learning principles:

- learning in non-formal contexts is intended and voluntary;
- young people and youth workers are actively participating in the planning, preparation, implementation and evaluation of the project;
- learning activities take place in a diverse range of environments and situations;
- the activities are carried out with the support of professional facilitators (such as trainers, youth workers, experts in the youth field) or volunteers (such as youth leaders, youth trainers, etc.);
- the activities usually document learning in a specific, field-oriented way.

The activities must also be planned in advance and be based on participatory methods that:

- offer space for interaction of participants, sharing of ideas, avoiding passive listening;
- allow participants to contribute to the activities with their own knowledge and skills, reversing the traditional roles of outside "experts" (a reversal of learning, from extracting to empowering);
- allow participants to undertake their own analyses, including reflections on competences acquired during the activity (i.e. their own learning outcomes);
- ensure that participants have influence over project decisions, not simply involvement.

Finally, the activities should have an intercultural/European dimension and:

- encourage participants to reflect on European topics and to involve them in the construction of Europe;
- offer participants the opportunity to identify common values with persons from different countries in spite of their cultural differences;
- challenge viewpoints that perpetuate inequality, discrimination;
- promote the respect of cultural diversity and fight against racism or xenophobia.

## 1. BEFORE MOBILITY

### a. AGREEMENT BETWEEN PROJECT PARTNERS

All participating organisations involved in a youth mobility project are strongly recommended to sign an internal agreement between them. Such an agreement has the purpose of clearly defining responsibilities, tasks and financial contribution for all parties involved in the project. It is up to the participating organisations to jointly decide on how the EU grant will be distributed and which costs it will cover.

An internal agreement constitutes a key instrument for ensuring a solid and smooth cooperation among partners in a youth mobility project as well as to avoid or manage potential conflicts. Indicatively, it should contain at least the following information:

- project title and reference of the grant agreement between the applicant participating organisation and the granting Agency;
- names and contacts of all the participating organisations involved in the project;
- role and responsibilities of each participating organisation; division of the EU grant (according to the above responsibilities);
- modalities of payments and budget transfers among participating organisations.

## b. ACCREDITATION OF ORGANISATIONS PARTICIPATING IN ERASMUS+ VOLUNTEERING ACTIVITIES

Accreditation serves to gain access to Erasmus+ volunteering activities and to ensure that the principles and minimum quality standards are met. These standards are set in the Erasmus+ volunteering Charter and in the Accreditation Guidelines that are published on the website[239] of the European Commission.

Any organisation from a Programme Country, a Western Balkan country, a Southern Mediterranean country, an Eastern Partnership country or from the Territory of Russia as recognised by international law wishing to send or receive volunteers or to coordinate a volunteering project must be accredited.

To be accredited, an organisation must submit an application for accreditation. This form must be submitted to the relevant bodies responsible for accreditation (see below). The same organisation may request to be accredited for one or more purposes (as sending, as receiving and/or as coordinating organisation). If the organisation has more than one role in a project application, it must have a valid accreditation for all those roles. The organisation submitting the project must be accredited as a Coordinating Organisation.

The applications for accreditation can be submitted at any time (no deadline). However, these requests must be submitted within reasonable time before the submission of the project application including volunteering activities (at least 6 weeks before the submission) in order to avoid that the activity is rejected due to the fact that some of the organisations involved are not yet accredited.

The accreditation of organisations is carried out by:

- the National Agency of the country where the organisation is located, for organisations located in Programme Countries;
- SALTO SEE for organisations located in Western Balkans countries;
- SALTO EECA for organisations located in Eastern Partnership countries and the Territory of Russia as recognised by international law;
- SALTO Euromed for organisations located in Southern Mediterranean countries.

Once approved, the accreditation is valid for the entire duration of the Erasmus+ Programme. The bodies in charge of accreditation may carry out regular or punctual controls to verify that the accredited organisations still meet the Erasmus+ volunteering quality standards. Following these controls, the accreditation may be temporarily suspended or withdrawn.

In order to facilitate partner-finding profiles of all accredited organisations are published in a database of Erasmus+ volunteering organisations (Volunteering Database)[240]. Accredited organisations are invited to use the Volunteering Database to advertise when they are looking for volunteers for Erasmus+ projects. The database can be consulted on the European Youth Portal.

**Note**: An organisation awarded a Quality Label within the context of the European Solidarity Corps Programme for volunteering activities does not need to apply for an accreditation under Erasmus+ to participate in volunteering activities. Such European Solidarity Corps Quality Label is valid in the context of the Erasmus + volunteering activities.

[239] http://ec.europa.eu/programmes/erasmus-plus/opportunities-for-organisations/learning-mobility/young-people-youth-workers_en

[240] Available at: http://europa.eu/youth/volunteering/

## c. Safety and Protection of Participants

### European Health Insurance Card

If applicable, it is strongly recommended that young people and youth workers taking part in youth mobility projects are in possession of a European Health Insurance Card. This is a free card that gives access to medically necessary, state-provided healthcare during a temporary stay in any of the 28 EU countries, Iceland, Liechtenstein and Norway, under the same conditions and at the same cost (free in some countries) as people insured in that country. More information on the card and on how to obtain it is available at http://ec.europa.eu/social/main.jsp?catId=559.

### Youth Exchanges

All participants in a Youth Exchange must be insured against the risks linked to their participation in these activities. The Erasmus+ Programme does not define a unique format of insurance, nor does it recommend specific insurance companies. The Programme leaves it up to participating organisations to seek the most suitable insurance policy according to the type of activity carried out and to the insurance formats available at national level. Furthermore, it is not necessary to stipulate a project-specific insurance, if the participants are already covered by insurance policies previously stipulated by themselves or the participating organisations. In any circumstances, the following areas must be covered: third party liability for youth leaders (including, wherever appropriate, professional indemnity or insurance for responsibility); accident and serious illness (including permanent or temporary incapacity); death (including repatriation in case of activities carried out abroad); wherever relevant, medical assistance, including after care and special insurance for particular circumstances such as outdoor activities.

### Erasmus+ Volunteering Insurance

Every volunteer must be enrolled in the Erasmus+ Volunteering Insurance[241] foreseen by the Erasmus+ Programme, which complements the coverage by the European Health Insurance Card and/or national social security systems.

Those volunteers who are not be eligible for the European Health Insurance Card shall be entitled to receive a full coverage through the Insurance provided by the European Commission.

The coordinating organisation, in cooperation with the sending and receiving organisations, is responsible for the enrolment of the volunteer(s). This enrolment must be done before the departure of the volunteer(s) and cover the duration of the activity.

Information about the coverage and support available through the insurance for volunteers, as well as instructions for enrolment, is available on the website of the Executive Agency.

## d. Visa requirements

Young people and youth workers taking part in youth mobility projects may need to obtain a visa for staying abroad in the Programme or Partner Country hosting the activity.

It is a collective responsibility of all the participating organisations to ensure that the authorisations required (short/long stay visas or residence permits) are in order before the planned activity takes place. It is strongly recommended that the authorisations are requested from the competent authorities well in advance, since the process may take several weeks. National Agencies and the Executive Agency may give further advice and support concerning visas, residence permits, social security, etc.

## e. Conditions of participation of volunteers

### Selection

The selection of volunteers can be carried out by any of the organisations involved in the project (usually this task is carried out by the sending or coordinating organisation).

The Erasmus+ Volunteering activities are open to all young people, including people with fewer opportunities. Volunteers are to be selected in a fair, transparent and objective way, regardless of their ethnic group, religion, sexual orientation, political opinion, etc. No previous qualifications, educational level, specific experience or language knowledge should be

241 CIGNA - https://www.cignahealthbenefits.com/en/plan-members

required. A more specific profile of the volunteer might be drawn up if justified by the nature of the tasks of the activity or by the project context.

The selection process should be always in compliance with the principles and quality standards of the Erasmus+ Volunteering activities.

### AGREEMENT WITH THE VOLUNTEER

Prior to their departure, each volunteer must sign a Volunteering Agreement with the coordinating organisation. This agreement defines the tasks s/he will carry out during the volunteering activity, the intended learning outcomes, etc. As part of the agreement, the coordinating organisation will provide the volunteer with the Erasmus+ volunteering Info-kit, which contains information about what to expect from the experience and on how to use Youthpass and receive a certificate at the end of the activity. The Volunteering Agreement remains an internal document among partners and volunteers; however it may be requested by the granting National Agency.

### MOBILITY TOOL

When the volunteers are selected, the beneficiary organisation must encode general information regarding the volunteer and the type of activity s/he will carry out (e.g. participant name, destination, duration of the activity, etc.) into Mobility Tool+ as soon as possible. Mobility Tool+ will support the beneficiary in the management of the Erasmus+ mobility activities. The beneficiary organisation is also responsible for updating Mobility Tool+ with any change occurred to participants or activities during the lifetime of the mobility project. Beneficiaries will be able to generate prefilled reports from Mobility Tool based on the information they have provided. Mobility Tool+ will also generate reports to be filled in by the participants in mobility activities.

More information about Mobility Tool+ and how to access it will be provided in the grant agreement between the National Agency and the beneficiary.

### LINGUISTIC SUPPORT

Young volunteers undertaking a volunteering activity lasting two months or longer are eligible to receive linguistic support prior to departure or during the activity.

For languages that are available through the Online Linguistic Support:

The Commission makes available an online tool for volunteers with a view to assess their competence in the language they will use to carry out their volunteering abroad. This tool offers them, where necessary, the possibility to improve the knowledge of the language before and/or during the mobility. Participants with a level of at least B2 in the main language of volunteering may choose to follow an OLS course in the language of the receiving country, if available. Such an online service will be gradually implemented in the course of the Programme. The linguistic support is provided as follows:

- at the time of applying, the applicant organisation will estimate the need for linguistic support for their participants - in the main language that volunteers will use to carry out their tasks or in the language of the receiving country, if applicable;
- National Agencies allocate online licences to beneficiary organisations according to general criteria specified by the European Commission;
- once selected, all volunteers (except native speakers and in duly justified cases) benefiting from the online service must carry out an online language test to assess their competences in the foreign language they will use during their mobility abroad or in the language of the receiving country, if applicable. The results of this assessment will be communicated to the volunteers and will not have any influence on their possibility to go abroad;
- based on the number of online licences available for language courses, the volunteers who need linguistic support may be offered the possibility to follow an online language course;
- at the end of their mobility, volunteers will carry out a second online language assessment to measure the progress made in the selected language. The results will be communicated to the volunteer, to the coordinating organisation upon request, and could thereafter be integrated in the Youthpass certificate.

In the initial stages of the Programme, the online assessment and courses will not be provided in all EU languages and language courses may not be available for all participants requesting them. Further details are made available on the websites of the Commission and National Agencies.

The existence of Online Linguistic Support should not prevent organisations from providing other types of language support to volunteers.

For languages that are not available through the Online Linguistic Support:

For languages not covered by the online service, support for language learning must be arranged by the participating organisations in the youth mobility project. A specific grant for "linguistic support" may be provided for that purpose. Beneficiaries of this grant should encourage participants to start learning the language before their activity. Furthermore, organisations involved in a youth mobility project can use the "organisational support" grant to address the needs of participants in terms of pedagogical, task-related, intercultural or specific linguistic preparation (see the "funding rules" section in Part B of this Guide).

#### PRE-DEPARTURE TRAINING

The quality of the preparation of the participants is a key element to implement a successful project. In this regard, a pre-departure training is to be provided to the volunteers. Pre-departure training is the responsibility of the participating organisations (usually the sending organisation or the coordinating organisation) and gives volunteers an opportunity to talk about their expectations, develop their motivation and learning objectives, and obtain information on their host country and on the Erasmus+ Programme. In addition, a one-day pre-departure training aimed at establishing contacts with the outgoing volunteers may be organised by the National Agencies.

## 2. DURING MOBILITY

### ERASMUS+ VOLUNTEERING TRAINING AND EVALUATION CYCLE

Volunteers have the right and obligation to participate in the following training and evaluation sessions, organised in line with the document "EVS Volunteer Training and Evaluation Cycle: Guidelines and Minimum Quality Standards of the European Commission", available on the website.

### WHO ORGANISES THE TRAINING AND EVALUATION CYCLE?

The responsibility for organising the Training and Evaluation Cycle depends on where the events are to take place:

- in Programme Countries: the training/evaluation is organised by the National Agencies;
- in Partner Countries neighbouring the EU (region 1-4): the training/evaluation is organised respectively by SALTO SEE, SALTO EECA and SALTO Euromed Resource Centres[242] in the countries covered by each of the centres respectively;
- in other Partner Countries: training and evaluation sessions are not organised by National Agencies or SALTOs. It is responsibility of the participating organisations to ensure that the volunteers receive on-arrival training and that they are provided a space for carrying out a mid-term evaluation of their experience. In this regard, for activities organised within the framework of Capacity Building in the youth field, the costs linked to such preparation can be covered under the item "activity costs".

As soon as the contract is signed by both parties, the coordinating organisations should immediately fill out the information about the volunteer(s) in Mobility Tool+ and contact the relevant National Agency or the SALTO Resource Centre in order to allow those structures to organise the Training and Evaluation sessions for the volunteers involved in their project.

In any case, beneficiaries are always encouraged to provide additional training and evaluation opportunities to the volunteers, even if no specific funds are allocated for that purpose within the project grant. All relevant providers of training and evaluation activities should provide information about Youthpass.

For projects lasting less than 2 months, participating organisations are responsible for organising preparation sessions that are adapted to the needs of the volunteers and/or to the type of activity. In addition, in cases of justified needs, an on-arrival training for short-term activities involving young people with fewer opportunities may be organised by the participating organisations. Within the framework of mobility projects, the costs linked to such sessions can be covered under the item "exceptional costs" for activities involving young people with fewer opportunities (see "funding rules" section in Part B of this Guide).

[242] https://www.salto-youth.net/

# 3. AFTER MOBILITY

### RECOGNITION OF LEARNING OUTCOMES - YOUTHPASS

Every young person, volunteer or youth worker taking part in a youth mobility project is entitled to receive a Youthpass certificate. Youthpass describes and validates the non-formal and informal learning experience acquired during the project (learning outcomes). Youthpass can also be used during the project activities as a tool to help participants to become more aware of their learning process. For support and more information on Youthpass, please consult the Youthpass guide and other relevant material at www.youthpass.eu.

# 4. MOBILITY OF YOUNG PEOPLE AND YOUTH WORKERS OUTSIDE MOBILITY PROJECTS

Beyond the mobility projects under Key Action 1, the Erasmus+ Programme supports mobility of young people and youth workers also under Strategic Partnerships and Capacity Building in the field of youth. In these cases, if applicable, the participating organisations must follow the same principles and quality standards set for the activities funded within the framework of mobility projects.

# ERASMUS MUNDUS JOINT MASTER DEGREES

## 1. CONDITIONS RELATING TO THE DESIGN OF THE ERASMUS MUNDUS JOINT MASTER DEGREES

An EMJMD must be fully developed at the time of the application and be ready to run for four consecutive editions as from the second academic year following the application if the consortium opts for a preparatory year after being selected. The EMJMD consortia that have opted not to implement a preparatory are expected to run the first edition of the Master immediately, thus the first academic year following their selection.

In order to comply with the minimum requirements set in the Programme Guide, HEIs established in a Programme Country must be able to demonstrate the accreditation of each degree-awarding Master programme on the basis of which the EMJMD programme is composed. Besides accreditation, national Master degree-awarding programmes must be mutually recognised by the consortium HEI partners from Programme Countries. If the proposed EMJMD study programme is the result of a completely new curriculum that cannot be associated with an already existing and accredited national Master programme, then the accreditation of the EMJMD must be confirmed at application stage. In addition, applicants should note that the process of recognition of EMJMD study periods within the consortium must have been agreed before the first EMJMD student intake starts.

Programme Country HEIs acting as partners in the consortium must be Master degree-awarding institutions with the capacity to issue either a joint or a multiple degree (at least a double degree) for EMJMD graduates. Consortia must also ensure that all graduated students are provided with a joint Diploma Supplement at the end of their study period, covering the entire content of the Master programme.

Unless applicants explicitly opt out, the first year will be a preparatory and promotion/awareness-raising year during which the programme will be advertised and the first intake of students selected. EMJMDs must ensure joint/common procedures for student admission requirements[243], teaching/training activities, quality assurance mechanisms, student examination and performance evaluation, consortium administrative and financial management, the nature/scope of services offered to students (e.g. language courses, visa support), etc. All students must be covered by a health and insurance scheme chosen by the consortium. This scheme must respect the minimum EMJMD requirements as defined in the respective guidelines available on the Executive Agency website.

These elements are crucial to demonstrate full integration of an EMJMD course and its implementing consortium. Therefore it is expected that a draft Consortium Agreement is provided at application stage which covers these and other important items in a clear and transparent manner. The existence of an up-to-date, comprehensive, and robust draft Consortium Agreement is a sign of the readiness of the partners and maturity of the application.

The EMJMD consortium will need to design joint promotion and awareness-raising activities in order to ensure worldwide visibility of the joint study programme as well as of the Erasmus+ scholarship scheme. These activities will necessarily include the development of an integrated and comprehensive course website (in English, as well as in the main teaching language if different) providing all the necessary information on the EMJMD for students and future employers, prior to the first scholarship application round.

The student application procedure and submission deadline should be designed in such a way that it provides the students with all the necessary information well in advance and with enough time to prepare and submit an application (i.e. at least 4 months before the scholarship deadline). The consortium is also encouraged to organise language courses in the language of the host institutions and offer courses in other widely spoken languages. Visibility will be supported through the Commission and Executive Agency websites, via National Agencies and EU Delegations. Guidelines on EMJMD websites can be found on the Executive Agency website.

## 2. CONDITIONS RELATING TO MASTER STUDENTS

Master students wishing to enrol in an EMJMD must have previously obtained a first higher education degree[244] or demonstrate a recognised equivalent level of learning according to national legislation and practices. Each EMJMD consortium will be responsible for defining its specific student application procedure and selection criteria in accordance with the requirements and guidelines available on the Executive Agency website. In this context, student candidates can apply for an EMJMD scholarship to any of the Erasmus+ Erasmus Mundus courses of their choice (EMJMD catalogue

[243] The selection procedure must be organised in a way to ensure that the best students worldwide are selected.

[244] While this condition must necessarily be fulfilled at the time of enrolment, EMJMD consortia may decide to accept scholarship applications from students in the last year of their first higher education degree.

available at the following webpage: http://eacea.ec.europa.eu/erasmus-plus/library/emjmd-catalogue_en), but are limited to a maximum of three different joint programmes per academic year.

Erasmus+ EMJMD student scholarships can be offered to students from any region of the world. Consortia will have to take geographical balance into account – i.e. no more than 3 candidates from the same country (/with the same nationality) should be awarded an EMJMD scholarship during the same intake. Students with double nationality must specify the nationality under which they submit their scholarship application. However, particular rules may apply in case of additional funding for specific regions of the world. EMJMD consortia will also be encouraged to enrol self-funded students[245] representing approximately 25% of the Erasmus+ scholarship holders.

EMJMD student scholarships are awarded for participation in the complete EMJMD programme. Scholarship holders cannot transfer university credits from courses taken prior to their enrolment in their EMJMD for the purpose of reducing their mandatory activities in the joint programme. Furthermore, EMJMD scholarship holders cannot at the same time be beneficiaries of a grant for student or staff mobility in the framework of other higher education programmes funded by the EU budget, and *vice versa*.

In order to guarantee full transparency in the EMJMD implementation rules, as well as to define the rights and responsibilities of enrolled students towards the EMJMD consortia, both parties (i.e. accepted students and EMJMD consortia) will have to sign a Student Agreement (see model on the Executive Agency website) prior to student enrolment in the EMJMD. This Student Agreement will cover all the academic, financial, administrative, behavioural, etc. aspects related to the EMJMD implementation and, for the scholarship holders, the scholarship management. It should include performance indicators for the successful acquisition of minimum ECTS credits (and the consequences in case of failure to acquire them), information about the services provided to the student, as well as details related to health/social security, mobility requirements, and thesis/exam/graduation rules, etc. For transparency, the Student Agreement template must be published on the EMJMD website of the consortium (all EMJMDs must have a specific webpage).

## 3. CONDITIONS RELATING TO MONITORING AND QUALITY ASSURANCE

In order to effectively monitor the implementation of EMJMD courses, the beneficiary consortia will need to apply a number of monitoring and Quality Assurance (QA) mechanisms:

- definition of a joint QA plan with common evaluation methods and criteria, agreed implementation timetable/milestones and follow-up actions. The QA procedure will need to be embedded in the EMJMD project design at application stage, notably internal and external evaluation exercises, feedback on indicators (e.g. employability of graduates, sustainability), etc. QA findings and conclusions drawn will be reported by the consortium to the Executive Agency;
- submission of regular interim/progress reports on the implementation of the project;
- quantitative and qualitative monitoring of the student mobility and performance (in terms of activities implemented, ECTS credits acquired and degree awarded) through the Executive Agency online Mobility Tool (EMT);
- liaison and cooperation (where applicable and expected) with the EM Alumni Association (EMA website: www.em-a.eu);
- joint meetings of the participating HEIs, student representatives, Executive Agency programme officer(s), staff of the National Agencies concerned and, when needed, external experts; at least two meetings will have to be organised by the EMJMD consortium during the period covered by the grant agreement;
- feedback from the enrolled students;
- participation in thematic cluster meetings organised by the Commission, the National Agencies or the Executive Agency to support exchange of good practice and mutual learning.

## 4. SELECTION PROCEDURE OF EMJMD CONSORTIA

The main objective of the EMJMD programme is to attract, select, and fund excellence; this should be understood both in terms of academic quality of the main actors (participating organisations and EMJMD Master students), as well as in terms of the implementation capacity of the consortia which are expected to carry out an integrated international study programme with students from Programme and Partner Countries. Proposals will be fully assessed by academic experts in a one step evaluation process.

Based on the assessment of the four award criteria, i.e. Relevance of the project, Quality of the project design and implementation, Quality of the project team and the cooperation arrangements, Impact and dissemination a ranking list of

[245] Self-funded students are either self-paying students or students who have been awarded a scholarship from another scheme.

all proposals will be established. Only those proposals that have passed the minimum threshold of at least 30 points out of 40 under the award criterion "Relevance of the project" and have scored at least 70 points out of 100 in total will be considered for funding.

Those proposals which pass all thresholds will be assessed for additional scholarships for targeted Partner Country regions defined under the section "Additional scholarships for students from targeted regions of the world". The academic experts will analyse and evaluate the answers given for the additional award criterion: "Relevance of the project in the targeted region(s)" and indicate, on a yes/no basis, whether the information is pertinent.

The assessment of the additional criterion will not influence the original ranking list resulting from the evaluation of the four award criteria (Relevance of the project, Quality of the project design and implementation, Quality of the project team and the cooperation arrangements, Impact and dissemination).

# STRATEGIC PARTNERSHIPS

## 1. PROJECT FORMATS

Strategic Partnerships support a wide and flexible range of activities in order to implement innovative practices, promote development and modernisation of organisations, and support policy developments at European, national and regional level.

Depending on the objectives of the project, the participating organisations involved, the expected impact, and other elements, Strategic Partnerships can be of different sizes, and adapt their activities accordingly. In simplified terms, this action enables participating organisations to gain experience in international cooperation and to strengthen their capacities, but also to produce high quality innovative deliverables. The quality assessment of the project application will be proportional to the objectives of the cooperation and the nature of the organisations involved.

The section below provides ideas on the types of activities that can be carried out within a Strategic Partnership either promoting a cross-sectoral cooperation or addressing a given field of education, training and youth. This section is purely illustrative and does not prevent participating organisations planning their project in a different way.

### ACTIVITIES:

- curricula, courses, joint study programmes, common modules (including e-modules), integration of a greater variety of learning modes (distance, part-time, modular learning);
- learning, teaching, training, youth work materials and methods, pedagogical approaches and tools;
- project-based collaboration, peer-learning, workshops, virtual laboratories, virtual collaboration spaces;
- capacity building and networking activities;
- elaboration and implementation of strategic cooperation plans;
- information, guidance, coaching and counselling activities;
- surveys, comparative analyses, evidence-gathering, studies of real life cases;
- definition of qualitative standards and competence-based/occupational profiles;
- improvement of qualifications frameworks, credit transfer, quality assurance, recognition and validation;
- learning, teaching and training activities (see paragraph 2 below).

Furthermore, all Strategic Partnerships will be expected to undertake a targeted and wide dissemination of their results so as to encourage their wider use and increase their impact beyond the organisations directly participating in the project. The requirements for dissemination will be proportional to the objective and scope of the project.

Organisations, institutions from different fields of education, training and youth, as well as from other socio-economic sectors can jointly cooperate in order to achieve – through their projects – the objectives in one or in several fields of education, training and youth. The following typologies of activities are particularly meaningful in each given field to achieve the policy objectives described in Part B of the Guide, within or across sectorial boundaries.

#### CROSS-SECTORAL COOPERATION:

Develop, test, adapt and implement innovative practices relating to:

- Strategic cooperation between different educational sectors and local/regional businesses, for example to investigate employability or ease of transition into the workforce or between educational levels;
- Joint research projects carried out through partnerships between higher education institutions and other educational levels, for example on assessment or learning outcomes related to transversal competences;
- Strategic cooperation between formal and non-formal/informal educational providers, for example related to ICT-based teaching or the enhancement of digital integration in learning;
- The investigation and analysis of coherent pedagogical approaches and methodologies especially those delivering transversal competences (such as entrepreneurship) which are developed across educational sectors;
- Project-based transnational cooperation between partners from different education sectors (for example, early years paired with upper secondary) investigating the use of CLIL[246] or reciprocal learning to increase language competences among learners of all ages from various fields of education, training and youth including those with migrant background;
- Cooperation and exchange of practice between staff responsible for support services at different educational levels (such as guidance counselling, coaching methods and tools, development of systems that help track student

[246] Content and language integrated learning.

progress); or those involved in student support services, to increase quality and coherence across educational sectors;
- Partnerships across educational levels which promote access to and learning through Open Educational Resources (OER) through the sharing of best practice and through development of OER at different levels;
- Joint research projects involving partnerships across education and youth sectors exploring the potential of learning analytics and crowd-assessment to increase the quality of learning;
- Cooperation between schools, VET providers and higher education institutions to investigate activities aimed at promoting stronger coherence between different EU and national transparency and recognition tools;
- Cooperation between youth sector and higher education institutions in order to facilitate the recognition and validation of non-formal and informal learning and its permeability with formal education pathways as well as permeability with different fields.

**HIGHER EDUCATION:**

- Develop, test, adapt and implement innovative practices relating to:
  - joint study programmes and joint curricula, intensive programmes and common modules – including e-modules – between partnership members from different countries, disciplines and economic sectors (public/private), ensuring the relevance towards the needs of the labour market;
  - project-based transnational collaboration between enterprises and students/staff at higher education institutions to study real life cases;
  - pedagogical approaches and methodologies especially those delivering transversal competences, entrepreneurship mindset and creative thinking, including by introducing multi-, trans- and interdisciplinary approaches, building learning mobility more systematically into curricula ('embedded mobility') and through a better exploitation of ICT;
  - the integration of a greater variety of study modes (distance, part-time, modular learning), notably through new forms of personalised learning, strategic use of open educational resources and virtual mobility and virtual learning platforms;
  - new approaches to facilitate permeability between education sectors (i.e. through validation of prior learning and possibility of flexible learning -modular studies, blended learning etc.);
  - professional guidance and counselling and coaching methods and tools;
  - the engagement of HEIs with local/regional authorities and other stakeholders based on a collaborative work in an international setting to promote regional development and cross sectoral cooperation to build bridges and share knowledge between the different formal and informal education and training sectors;
  - cooperation and exchange of practice between staff responsible for support services, such as guidance counselling, coaching methods and tools, development of systems that help track student progress; or those involved in student support services, to increase quality (i.e. attract and retain non-traditional learners, e.g. adults, and underrepresented groups in higher education);

- Facilitate recognition and certification of skills and competences at national level through effective quality assurance based on learning outcomes and by referencing them to European and national Qualification Frameworks.
- Develop flexible pathways for HE students and graduates, including validation of their prior learning.

**VOCATIONAL EDUCATION AND TRAINING:**

- Develop, test, adapt and adopt/implement innovative practices relating to:
  - re-/definition of competence standards according to learning outcomes; adaptation or development of VET curricula and courses accordingly, also of accompanying learning material and tools;
  - VET learning and teaching methodologies and pedagogical approaches especially those delivering key competences and basic skills; language skills; focusing on the use of ICT;
  - new forms of practical training schemes and study of real life cases in business and industry; development and implementation of project-based transnational collaboration between enterprises and students/staff at VET institutions;
  - development and delivery of new VET teaching and training materials and methods, including work based learning, virtual mobility, open educational resources and better exploitation of the ICT potential, e.g. setting up virtual laboratories/workplaces adapted to labour market needs;
  - professional guidance and counselling and coaching methods and tools;
  - tools and methods for professionalization and professional development of VET teachers, trainers and staff; particular focus on improved initial education and in-service training for VET teachers and trainers;
  - management and leadership of VET organisations;
  - strategic cooperation between VET providers and local / regional business communities, including economic development agencies;

    - cooperation for developing creativity and innovation between VET providers, HEIs and design, art, research and innovation centres;
- Facilitate recognition and certification of skills and competences at national level by referencing them to European and national Qualification Frameworks and using EU instruments; develop flexible pathways for VET students and graduates, including validation of their prior learning;
- Implement credit transfer (ECVET) and quality assurance (EQAVET) by VET providers.

**SCHOOL EDUCATION:**

- Develop, test, adapt and adopt/implement innovative practices relating to:
    - new curricula, courses, learning materials and tools;
    - learning and teaching methodologies and pedagogical approaches, especially those delivering key competences and basic skills, language skills, and focusing on the use of ICT;
    - new forms of practical training schemes and study of real life cases in business and industry;
    - new forms of learning and providing education and training, notably strategic use of open and flexible learning, virtual mobility, open educational resources and better exploitation of the ICT potential;
    - guidance, counselling and coaching methods and tools;
    - tools and methods for professionalization and professional development of teachers, trainers, and other staff, with particular focus on improved initial education and in-service training for teachers;
    - management and leadership of education and training institutions;
    - outreach activities between organisations in different education, training and youth sectors;
    - strategic cooperation between learning providers on the one hand and local/regional authorities on the other hand;
- Exchange experiences and good practice, carry out peer learning activities and workshops;
- Carry out joint research, surveys, studies and analyses;
- Facilitate recognition and certification of skills and competences at national level by referencing them to European and national Qualification Frameworks and using EU validation instruments.
- Promote cooperation between local and/or regional school authorities from different Programme countries in order to support strategic development through projects involving schools and local private and civil society organisations active in the labour market or in the fields of education, training and youth.

**ADULT EDUCATION:**

- Develop, test, adapt and adopt/implement innovative practices relating to:
    - new curricula, courses, and accompanying learning materials and tools for adult learners;
    - learning and teaching methodologies and pedagogical approaches for adult learners, especially those delivering key competences and basic skills; language skills; focusing on the use of ICT;
    - new forms of adult learning and providing adult education, notably strategic use of open and flexible learning, virtual mobility, open educational resources and better exploitation of the ICT potential;
    - guidance, counselling and coaching methods and tools for adult learners;
    - tools and methods for professionalization and professional development of adult education teachers and staff; particular focus on improved initial education and in-service training for adult education teachers;
    - management and leadership of adult education organisations;
    - outreach activities between organisations in different education, training and youth sectors;
    - strategic cooperation between adult learning providers on the one hand and local/regional authorities on the other hand;
- Providing flexible pathways for adult learners including validation of their prior learning:
    - comparative analysis of management or implementation models and approaches
    - practical application and testing of methods for valuing knowledge and competencies acquired through informal and non-formal learning
- Improving the accessibility of learning opportunities for adults:
    - promoting the development of multi-purpose learning centres and regional networks of learning providers
    - measures to develop the learning dimension of organisations not primarily concerned with education (e.g. cultural organisations)
    - development of training courses to improve the availability and quality of European training courses available to adult education teachers, managers or other adult education staff
- Facilitate recognition and certification of skills and competences at national level by referencing them to European and national Qualification Frameworks and using EU instruments.

**YOUTH:**

- Youth work cooperation activities for the development, testing, adaptation and/or implementation of innovative youth work practices. These activities may concern:
  - methods, tools and materials aimed at fostering young people's key-competences and basic skills as well as language and ICT skills;
  - methods, tools and materials for the professionalization and professional development of youth workers (e.g. curricula, training modules, resource materials, good practices, validation instruments etc.);
  - new forms of delivering youth work and providing training and support, notably strategic use of open and flexible learning, virtual mobility, open educational resources and better exploitation of the ICT potential;
  - youth work programmes and tools aimed at combating social exclusion and early school leaving
  - strategic networking and cooperation among youth organisations and/or with organisations in education and training fields as well as in the job market;
  - strategic cooperation with local/regional public authorities;
- Recognition and certification of skills and competences at national level by referencing them to European and national Qualification Frameworks and using EU validation instruments.
- Trans-national youth initiatives: cooperation activities, fostering social commitment and entrepreneurial spirit, jointly carried out by two or more groups of young people from different countries (see below).

**FOCUS ON:**

- creativity, innovation and modernisation;
- strategic use of Information and Communication Technologies (ICTs) methodologies and virtual collaboration;
- open educational resources (OER);
- quality of education, training and youth work;
- entrepreneurship education (including social entrepreneurship);
- equity and inclusion;
- basic skills and transversal skills (language skills, digital skills and enterpreneurship);
- recognition and validation of learning outcomes across formal, non-formal and informal learning;
- promotion of flexible learning pathways;
- professionalisation and professional development in education, training and youth work;
- management and leadership skills;
- active participation of young people in society;
- inter-institutional cooperation;
- inter-regional cooperation;
- synergies between policy and practice.

**TARGETS AND PARTICIPANTS:**

- practitioners;
- staff active in education and training;
- youth workers;
- experts, specialists, professionals;
- students, trainees, apprentices, school pupils, adult learners, young people, volunteers;
- NEETs (people not in employment, education or training);
- young people with fewer opportunities;
- early school leavers;
- decision-makers;
- researchers.

**PARTNERS THAT MAY BE INVOLVED IN THE SAME PROJECT**

- education, training and youth organisations;
- organisations that work across a range of fields and sectors (e.g. skills centres or chambers of commerce, etc.) public sector bodies;
- enterprises, companies, representatives of business and labour market;
- community organisations;
- research and innovation bodies;
- civil society organisations;
- social partners.

## 2. TRAINING, TEACHING AND LEARNING EMBEDDED IN STRATEGIC PARTNERSHIPS

Strategic Partnerships may also organise training, teaching and learning activities of individuals, in so far as they bring added value in the achievement of the project's objectives. Some of these activities are particularly relevant in one or more fields of education training and youth, and notably

| Type of activity | Particularly relevant for |
|---|---|
| Blended mobility of learners | All fields of education, training and youth |
| Short-term exchanges of groups of pupils | School education |
| Intensive Study Programmes | Higher education |
| Long-term study mobility of pupils | School education |
| Long-term teaching or training assignments | Higher education, VET, School and Adult education |
| Long-term mobility of youth workers | Youth |
| Short-term joint staff training events | All fields of education, training and youth |

The sections below provide additional descriptions of the activities listed above.

### LEARNERS

#### INTENSIVE STUDY PROGRAMMES (STUDENTS: 5 DAYS TO 2 MONTHS; TEACHING STAFF/INVITED TEACHERS: 1 DAY TO 2 MONTHS)

An Intensive Study Programme (ISP) is a short programme of study which brings together students and teaching staff from participating higher education institutions as well as other relevant invited experts/specialist/professionals in order to:

- encourage efficient and multinational teaching of specialist topics;
- enable students and teachers to work together in multinational and multidisciplinary groups and so benefit from special learning and teaching conditions not available in a single institution, and to gain new perspectives on the topic being studied;
- allow members of the teaching staff to exchange views on teaching content, new curricula approaches, to test innovative teaching methods that could eventually become part of a newly devised joint course or curriculum in an international classroom environment.

Desirable features of an ISP are the following:

- ISPs should provide significantly new learning opportunities, skills development, access to information and to state-of-the art research results and other knowledge, etc. for the participating teachers and students;
- the workload of participating students should be recognised through ECTS credits (or equivalent system);
- ISPs are expected to use ICT tools and services to support the preparation and follow-up of the ISP, thereby contributing to the creation of a sustainable learning community in the subject area concerned;
- the ratio of staff to students should guarantee active classroom participation;
- a balance should be kept between the participation of transnational and national students and staff;
- the ISP should present a strong multidisciplinary approach, fostering the interaction of students from different academic disciplines;
- in addition to the learning outcomes on subject-related competences, ISPs should favour the transfer of transversal competences.

The selection of ISP participants (teaching staff and students) is carried out by the Strategic Partnership consortium.

The number of teaching and training hours must ensure that the majority of time spent abroad is related to education and training and not to research or any other activity.

#### BLENDED MOBILITY OF STUDENTS, TRAINEES, ADULT LEARNERS, SCHOOL PUPILS, YOUNG PEOPLE (5 DAYS TO 2 MONTHS OF PHYSICAL MOBILITY)

Activities that combine one or more short periods of physical mobility (up to 2 months in total) with virtual mobility (i.e. the use of information and communication technologies such as collaborative workspaces, live

streaming, videoconferencing, social media, etc. to complement or prolong the learning outcomes of physical mobility). It can be used to prepare, support and follow up physical mobility. It can also be organised to address people with special needs or with fewer opportunities to help them overcome the barriers to long-term physical mobility.

### SHORT-TERM EXCHANGES OF GROUPS OF PUPILS (3 DAYS TO 2 MONTHS)

Short-term exchanges of groups of pupils can be organised between schools from different countries participating in the same Strategic Partnership. During such events, pupils work together in one of the partner schools and can be hosted in each other's families. Joint project work during the visits should be linked to the aims of the Strategic Partnership. Please note that the cooperation between schools in a partnership should not be limited to such events but also include common online and local activities. Schools are encouraged to use eTwinning in order to work together on the project before and after the mobility events.

Pupils undertaking short-term exchanges should always be accompanied by adults to ensure their protection and safety, as well as their effective learning during the mobility experience.

Joint project work events during the visits should give pupils and teachers in different countries an opportunity to work together on one or more topics of mutual interest. They help pupils and teachers to acquire and improve skills not only in the topic or subject area on which the project is focused, but also in terms of teamwork, intercultural learning, social relations, planning and undertaking project activities and using information and communication technologies (ICT). Participating in joint project work with groups of pupils from partner schools from different countries also gives pupils and teachers the opportunity to practice foreign languages and increases their motivation towards language learning.

Project activities should ideally be integrated into the regular activities of the schools and be included in the curriculum of participating pupils. Pupils should be able to be involved in all phases of the project, including the planning, organisation and evaluation of activities.

### LONG-TERM STUDY MOBILITY OF PUPILS (2 TO 12 MONTHS)

The aim of the activity is to strengthen the cooperation between the schools involved in the same Strategic Partnership. The mobility activities should be linked to the aims of the Strategic Partnership and need to be embedded in the project design. Schools are encouraged to use eTwinning in order to work together on the project before, during and after the mobility activities of pupils. These measures should help in maximising the impact on participating schools. The activity also allows pupils to develop their understanding of the diversity of European cultures and languages, and helps them acquire competences necessary for their personal development. The schools involved in the partnership should work together on developing learning agreements, recognising the studies undertaken at the partner school abroad and strengthening the European dimension in school education. This activity should also be a valuable international pedagogical experience for the teachers involved in the organisation and implementation of the mobility.

Participants are selected by the schools. They need to be pupils aged at least 14 and be enrolled full-time in a school participating in the Strategic Partnership. Selected pupils can spend between 2 and 12 months in a receiving school and a host family abroad.

A reciprocal exchange of pupils between schools/host families is encouraged but is not compulsory.

All actors involved in the study mobility – schools, pupils, their parents and host families – should consult the specific Guide to Study Mobility of Pupils which aims to help them in implementing the activity and ensure the safety and well-being of the pupils involved. The Guide specifies roles and responsibilities, gives guidance and provides the necessary templates and forms for participants. The Guide is available in English at the Europa website and in translation at the website of the relevant National Agency.

### ONLINE LINGUISTIC SUPPORT

Participants in long-term mobility activities (2 to 12 months) within a Strategic Partnership can benefit from linguistic preparation. In this regard, an online linguistic support will be gradually implemented in the course of the Programme. Such online support is made available by the European Commission to selected pupils, with a view to assess their competence in the language they will use to study abroad. This tool also offers them, where necessary, the possibility to improve the knowledge of the language before and/or during the mobility period.

When implemented for schools, the online linguistic support will be provided as follows:

- National Agencies allocate online licences to schools according to general criteria specified by the European Commission.
- Once selected all pupils (except native speakers) benefiting from the online service will carry out an online test to assess their competences in the language they will use for studying. The results of this test will be communicated to the pupil and the school.
- Based on the number of online licences available for language courses, schools will distribute licences according to needs.
- At the end of the mobility period, pupils will carry out a second assessment to measure the progress made in the foreign language.

Further details on the online linguistic support are made available on the websites of the European Commission and National Agencies.

For languages not covered by the Commission's service, a specific grant for "linguistic support" may be provided for that purpose.

## STAFF IN EDUCATION AND TRAINING AND YOUTH WORKERS

### SHORT-TERM JOINT STAFF TRAINING EVENTS (3 DAYS TO 2 MONTHS)

Joint staff training events allow the participating organisations in the Strategic Partnership to organise short training events for education and training staff or youth workers linked to the topic or scope of the Strategic Partnership. These should be organised for small groups of staff from different countries in order to maximise the impact on each participating organisation.

They can have various formats, i.e. study visits combining on-site visits to relevant organisations, presentations, discussion workshops, training courses, etc. A balance should be kept between the participation of transnational and national participants.

### TEACHING AND TRAINING ASSIGNMENTS (2 TO 12 MONTHS)

The aim of the activity is to strengthen the cooperation between the organisations involved in the same Strategic Partnership. The activity allows staff to develop their knowledge and understanding of European education and training systems, and helps them share and acquire professional competences, methods and practices.

This activity allows teachers/professors and other educational staff in general school education, higher education, VET or adult education working in an educational institution participating in a Strategic Partnership to undertake an assignment of 2 to 12 months abroad, teaching in a partner institution or engaging in professional activities in another partner organisation related to the field of their expertise. The activity may consist of work in an educational institution/centre or other relevant organisation (e.g. enterprises, NGOs, school authorities, etc.), participation in structured courses or seminars (e.g. in teacher training colleges or research organisations), placements or observation periods in a company or organisation in the field of education, training or youth.
The sending institution has to ensure a fair, transparent and open selection process, to develop the content of the activity with the participant and to ensure an internal and as far as possible external recognition of this long-term mobility abroad.

As regards teaching and training assignments in higher education, the following types of sending and receiving organisations are eligible:

- For long-term staff mobility for teaching, the sending organisation can be any participating organisation while the receiving organisation must be a participating HEI.
- For long-term staff mobility for receiving training, the sending organisation must be a participating HEI while the receiving organisation can be any participating organisation.
- The sending and receiving organisations must be located in different countries and the receiving country must be different from the country of residence of the participant.

The organisations involved in the Strategic Partnership work together on developing mobility agreements, recognising the work undertaken at the partner organisation abroad and strengthening the European dimension in education and training. This activity should also be a valuable international experience for those involved in the organisation and implementation of the mobility activity at both the sending and the receiving organisation.

### MOBILITY OF YOUTH WORKERS (2 TO 12 MONTHS)

This activity allows youth workers to experience a different working reality than the one in their home countries, increasing their professional, personal and intercultural competences. Youth workers have the possibility to work abroad for a period from 2 to 12 months actively contributing to the daily work of the receiving organisation, at the same time enriching their profile as professionals in the field. These activities also aim at strengthening the capacities of the organisations involved, benefiting from new perspectives and experiences. Mobility activities can be carried out either as individual activities (i.e. one youth worker being sent to a receiving organisation) or in pairs, as a mutual exchange of youth workers (simultaneously or not) between the two partner organisations.

### ONLINE LINGUISTIC SUPPORT

Participants in long-term mobility activities within a Strategic Partnership can benefit from linguistic preparation. In this regard, an online linguistic support will be gradually implemented in the course of the Programme. Such online support is made available by the European Commission to selected staff and youth workers, with a view to assess their competence in the language they will use to study abroad. This tool also offers them, where necessary, the possibility to improve the knowledge of the language before and/or during the mobility period.

When implemented for staff and youth workers, the online linguistic support will be provided as follows:

- National Agencies allocate online licences to organisations according to general criteria specified by the European Commission.
- Once selected all participants (except native speakers) benefiting from the online service will carry out an online test to assess their competences in the language they will use for studying. The results of this test will be communicated to the participant.
- Based on the number of online licences available for language courses, organisations will distribute licences according to needs.
- At the end of the mobility period, participants will carry out a second assessment to measure the progress made in the foreign language.

Further details on the online linguistic support are made available on the websites of the European Commission and National Agencies.

For languages not covered by the Commission's service, a specific grant for "linguistic support" may be provided for that purpose.

### TRANSNATIONAL YOUTH INITIATIVES

Strategic Partnerships in the field of youth also support the development of transnational youth initiatives fostering social commitment and entrepreneurial spirit, jointly carried out by two or more groups of young people from different countries.

For example, these initiatives may concern:

- the establishment of (networks of) social enterprises, associations, clubs, NGOs;
- the development and delivery of courses and trainings on entrepreneurship education (notably social entrepreneurship and use of ICTs;
- information, media literacy, sensitization actions, or actions stimulating civic commitment among young people (e.g. debates, conferences, events, consultations, initiatives around European topics, etc.);
- actions for the benefit of the local communities (e.g. support to vulnerable groups such as elderly people, minorities, migrants, disabled, etc.);
- artistic and cultural initiatives (theatre plays, exhibitions, music performances, discussion fora, etc.).

A Youth Initiative is a project initiated, set up and carried out by young people themselves. It gives young people the chance to try out ideas through initiatives, which give them an opportunity to be directly and actively involved in planning and carrying out a project. Participation in a Youth Initiative is an important non-formal learning experience. While implementing a Youth Initiative, young people have the opportunity to address specific challenges or problems encountered in their communities. They have the opportunity to discuss and reflect their chosen topic in a European context, to contribute to the construction of Europe.

A Youth Initiative must be transnational: a networking of local activities jointly carried out by two or more groups from different countries. Cooperation with international partners in transnational Youth Initiatives is based on similar needs or interests, in order to share practices and learn from peers.

Youth initiatives enable a large number of young people to become inventive and creative in their daily life and to speak out on their local needs and interests but also on the challenges faced by the communities they live in.

Young people can try out ideas by initiating, setting up and carrying out a project affecting various areas of life. Youth Initiatives can also lead to the self-employment or setting up of associations, NGOs or other bodies active in the area of social economy, no-profit and youth fields.

Young people carrying out transnational Youth Initiatives may be supported by a coach. A coach is a resource person who has youth work and/or Youth Initiatives experience to accompany groups of young people, facilitate the learning process and support their participation. S/he plays different roles depending on the needs of a given group of young people.
The coach remains outside the Youth Initiative but supports the group of young people in the preparation, implementation and evaluation of their project based on the needs of the group. Coaches support the quality of the learning process and they provide an on-going partnership designed to help a group or individuals produce fulfilling results in their projects. A coach is not: a project leader; a consultant/adviser; a member of the group carrying out the project; a professional trainer/expert providing only a technical support in a specific field; the legal representative of the project. If the Youth Initiative is carried out by minors, the support of a coach is compulsory.

## 3. Examples of Strategic Partnerships

### Promotion of flexible learning pathways

Integrating practical and theoretical knowledge in higher education institutions' curricula can provide opportunities for students to gain the skills needed now and in the future on the labour market, and thus improve their future employability. A Strategic Partnership will support a project-based collaboration between enterprises and students and staff at HEIs, to develop, test and adapt a joint curriculum between participating HEIs, based on an exhaustive needs analysis and focusing on a “real-life” transnational approach. This will also imply teaching/learning activities, including exchange of personnel between HEIs and enterprises, and integrated ("embedded") mobility, in which students follow a joint programme, the components of which are taught by different partners and on different locations. The final result is the delivering of the joint curriculum and the dissemination to organisations beyond the partnership. The partnership consists of HEIs and enterprises, including SMEs and social enterprises, to ensure the necessary competence as well as the adequacy of the skills developed within the joint curriculum.

### Integrated local/regional development

The elaboration of integrated local/regional development plans can hugely benefit from the involvement of all the relevant stakeholders. A Strategic Partnership will develop, test and implement innovative course packages enriching each curriculum of the partner HEIs in view of delivering double certificates or double degrees. The project will involve key stakeholders and rely on their continuous supervision in particular via a specific Steering Group to ensure that the needs of local/regional actors are conveniently met. The project will also imply teaching/learning activities, including exchange of personnel between HEIs and student "blended" mobility. The final result is the integration of these course packages into the curriculum and the delivery of a double certificate/degree. The partnership includes higher education institutions, as well as local actors and local level public authorities.

The involvement of less experienced partners in the activities carried out can be gradual, ensuring that, at the latest in the last year of the project, all partners are integrated into the whole package of activities.

### Creativity and innovation

Small and medium-sized enterprises face the challenges of skill development and innovation without necessarily having adequate resources or the strategic vision to cope with fierce market competition. A Strategic Partnership supports the spread of a creative and innovative culture inside small businesses by transferring and implementing methodologies, tools and concepts that facilitate organisational development and product creation. Partners from the creative sectors and higher education institutions help the other partners to learn how to apply creative thinking successfully in their organisations and to develop the capacity for innovation and change.

One tangible outcome is the production of tailor-made action plans for creativity and innovation development based on previous analyses of success cases and methodologies. The partnership includes creative sectors, small-and medium-sized enterprises, employers' associations, chambers of commerce, industry or craft.

### QUALITY OF EDUCATION

Local school authorities in Sweden, Denmark and UK partner up to propose a Strategic Partnership. The local authorities have identified a need to improve the quality of education in science, maths and technology, and have designed a project aiming to develop a joint framework for supporting pupils' involvement in learning. The objectives of the project are to improve the quality of education in maths and the natural sciences, and to increase the take-up of these subjects in upper secondary and higher education. The project is led by the two local authorities, and involves all primary and lower secondary schools in the respective areas. In addition, the local authorities have involved other partners from their local communities: universities, a media centre as well as several enterprises and business associations in the fields of technology, science and the environment. The project activities involve staff exchange between the participating organisations, with the aim of exchanging experiences and good practice. The partners share materials and resources, and develop units of cross-curricular work in maths, science and technology that are tested/implemented in primary and secondary schools. The business partners invite school classes for study visits to give pupils insight into the various practical applications of the topics they are working on. University students contribute as "study buddies" for pupils, providing additional one-on-one help with the subjects as well as serving as role models, motivating pupils to study science and technology. The project results in university cooperation on initial teacher education as well as further pedagogical cooperation and new projects between the schools involved.

### INCREASING EDUCATION ATTAINMENT

Increasing the level of tertiary attainment, widening access and facilitating completion of higher education studies are major challenges in many countries. A Strategic Partnership will support the development of better progression routes into higher education and to graduation, with a specific focus on non-traditional learners, such as students from under-represented groups or with disadvantaged backgrounds, by transferring and testing innovative approaches. The Partnership will test how upper secondary students with specific backgrounds are prepared and guided before entering into higher education via collaboration between HEIs, schools and institutions active in the field of VET. Monitoring and support of this student population will also be tested, in particular via tailor-made services (guidance, counselling, coaching etc.) that aim at preventing drop-out and encouraging graduation within the expected time. The project will involve HEIs as well as upper secondary general and vocational education schools, ensuring that the services offered are adequate and match the identified needs. The project will also imply teaching/learning activities, including "blended" student mobility. The final result is the adaptation of the model, its implementation by participating HEIs and the dissemination to organisations beyond the partnership, aiming in particular at other education providers and key policy-makers.

### INNOVATION

A Strategic Partnership will support the development of new pedagogical approaches and in particular e-learning tools and on-line collaborative platforms where pupils, students and teachers will be able to learn, teach and co-create content of courses. The Partnership composed of universities, schools, research organisations and/or enterprises will develop together the tools that schools and higher education institutions will use to teach and learn specific disciplines at different levels. Research organisations and/or enterprises will have a key role either to develop the tools or to make the content more relevant and concrete. In addition, intensive study programmes will be organised to test the tools developed by the partnership with students and teachers. Joint staff training events will also allow training the teachers in using the tools.

### LANGUAGE SKILLS

A cross-sectoral Strategic Partnership aiming to support those families where more than one language is spoken, by developing languages resources for children to show them the benefits of having two or more languages, both in terms of its intrinsic value and in view of concrete use they can make of it. This project addresses all stakeholders that work with bilingual families so that they can disseminate the project resources to them. Research is carried out to test the efficiency of the pedagogical approaches used to strengthen the language competences of multilingual children, both in the classroom and through informal learning. Partners include a university, several schools, a small and medium-sized enterprise (SME), an NGO and an association of adult learning institutions.

### INFORMATION AND COMMUNICATION TECHNOLOGIES

A cross-sectoral project aiming to develop a shared vision on how ICTs can help making lifelong learning a reality for all based on real-life scenarios and insights. The use of ICT for learning in Europe is gaining ground, but to unleash its potential as a driver of change for our economies and societies, there is a need to move from fragmentation and piloting to articulation and system adoption. Partners include a range of higher education institutions, skills organisations that work across a number of different educational fields.

### COOPERATION BETWEEN REGIONS

A Spanish, a Portuguese, an Italian and a Czech local authority partner up to explore the causes of early school leaving in their regions, and to develop new solutions to address it. They involve the secondary schools in their respective regions, as well as two teacher education institutions. Looking at the problem of early school leaving in a wider perspective, they want to address several aspects of young people's lives. Therefore, local youth organisations and parent associations are also invited to join the Strategic Partnership. The local authorities themselves are involved on a broad, cross-sectoral basis, including education departments, youth and social services.

The aim is to establish a permanent network in each region, bringing different actors and services together to create an effective support mechanism for young people.

The partner institutions work together through regular project meetings as well as an online community. First, they want to establish the extent of early school leaving in their area and explore its causes. Then they aim to find and implement effective ways of supporting young people at risk of exclusion. As part of the project activities they conduct surveys for pupils, teachers and families to investigate the reasons for early school leaving in their local context. They also organise workshops and seminars exploring a range of topics, for example the impact of informal learning opportunities.

As a result, they develop a common methodology which is implemented in the two regions. A guide for teachers, trainers and local authorities is published to support this. All results and materials are shared on the project website, through paper publications, and through a conference in each of the regions. In this way, the methodology and resources developed by the project are introduced to other schools and local authorities.

### EQUITY AND INCLUSION

Youth organisations, institutions, schools, VET providers and authorities in the youth field working with NEETs ("Not in Education, Employment, or Training") and drop-outs, come together with the aim of improving a methodology to have more young people back to education or work. In the frame of their Strategic Partnership they organise transnational meetings of staff to exchange practices and design the project, as well as carry out job shadowing and professional development activities of youth workers. At the same time, a research compilation in the field is conducted, and discussed during a transnational meeting where a final handbook is developed and plans the testing and evaluation of the improved methodology. To ensure sustainability and dissemination of project results, the Strategic Partnership foresees conferences al local, national and European level, as well as designs jointly a follow-up strategy.

### OPEN EDUCATIONAL RESOURCES (OER)

Fire fighters can be killed or injured when responding to fires inside burning buildings. Practical training tailored to address critical situations inside burning buildings could prevent lethal accidents. A Strategic Partnership creates a learning package based on state-of-the-art methodology and technology. The final result is a blended e-learning programme that provides supplementary training in firefighting strategy and tactics to address the initial phase of an intervention to create capability for early, efficient emergency response. The e-learning is combined with practical exercises. The Strategic Partnership includes fire and rescue services, public authorities responsible for public safety and of course VET providers.

### ACTIVE PARTICIPATION OF YOUNG PEOPLE IN SOCIETY

Three upper secondary schools from Finland, Germany and the Netherlands find each other on the eTwinning platform because they are all interested in developing a project on democracy in school. The three schools decide to apply for funding for a Strategic Partnership. The aim of the project is to develop school leadership by involving teachers, pupils and also parents in the school decision-making. The project lasts three years and each year the participating schools look at how each of these groups is currently involved in the school decision-making and how their participation could realistically be improved on the basis of what they learn from their partners. The project is supported by and actively involves the school management, teachers and parents. Participating pupils develop their autonomy and critical thinking skills, as well as their understanding of concepts such as freedom, rights and obligations. They also reflect on how they can contribute to make their school more relevant for them. Throughout the project activities, pupils are given the opportunity to express their opinions, to listen to the opinions of others, to discuss using relevant arguments, and to explain decisions using valid reasons. The project activities take place both through the project TwinSpace on the eTwinning site and face to face in two meetings where a group of pupils from each school participate with their teachers. School management and representatives of parents also participate in the meetings. In between project meetings, the partners also use the eTwinning site to collaborate on developing the project activities, discuss and share resources. Pupils write a collaborative blog where they post pictures and updates on project activities, as well as opinions and reflections on the topics they are working on. The blog, the teaching plans and learning materials developed in the project, as well as some of the pupils' work, are published through eTwinning and made available as a resource for others who want to conduct a similar project.

### TRANSVERSAL SKILLS / BASIC SKILLS

With an aim of improving numeracy and financial literacy competences of disadvantaged adult groups (migrants, low-skilled, socio-economically disadvantaged, etc.), adult education organisations, in cooperation with local/regional authorities and social partners develop up-to-date training provisions by using new and adequate training methodologies and resources. Outputs, such as curricula, handbooks for trainers, kits/toolboxes for adult learners are tested by the partner organisations and validated by the relevant stakeholders. A targeted dissemination activity is a prerequisite for an impact not only on adult learners' competencies but at local/regional level as the project may offer tailored learning opportunities to disadvantaged groups leading to their integration into local society.

### RECOGNITION AND VALIDATION OF LEARNING OUTCOMES

Partner organisations may give significant input to the process of validation of non-formal and informal learning. Considering the different situation in the partners, the exchange of ideas and experiences the Strategic Partnership may analyse the current state and propose recommendations for validation in their countries.

### PROFESSIONAL DEVELOPMENT AND PROFESSIONALISATION IN YOUTH WORK

Inspired by the priorities of the EU Youth Strategy, a group of experienced youth workers establish a Strategic Partnership with people responsible for youth work at institutional level, youth think tanks, educational institutions specialised in youth work, and researchers, in order to come up with a set of reference documents supporting youth workers in their activities dealing with mental health of young people. In the frame of the project, all partners come together to map and analyse key concepts as base for their research. They organise seminars with experts, meetings and study visits to document their work, as well as bring together young people and youth workers with experiences in the area of mental health in order to exchange good practices and ideas, with the final aim of publishing a book once the project is concluded and disseminating it among practitioners in the field.

# CAPACITY BUILDING IN THE FIELD OF HIGHER EDUCATION

## 1. CLARIFICATIONS ON THE SCOPE OF THE EU GRANT

### STAFF COSTS

The applicant will estimate the staff workload required on the basis of the category of staff concerned and the number of days to be worked on the project, in relation to the activities, the work-plan and the outputs and results foreseen. Working days might include week-end, obligation and bank holidays. For the sake of estimating the budget, working days per individual will not exceed 20 days per month or 240 days per year. The estimation of the budget results from applying Erasmus+ contribution to unit costs for staff. It is independent from the actual remuneration modalities that will be defined in the partnership agreement and implemented by the beneficiairies.

The profile of staff involved in capacity-building projects is regrouped in four categories:

- **Managers (staff category 1)** (including legislators, senior officials and managers) carry out top managerial activities related to the administration and coordination of project activities.
- **Researchers, teachers and trainers (RTT) (staff category 2)** typically carry out academic activities related to curriculum/training programme development, development and adaptation of teaching/training materials, preparation and teaching of courses or trainings.
- **Technical staff (staff category 3)** (including technicians and associate professionals) carries out technical tasks such as book-keeping, accountancy and translation activities. External translation services and external language courses provided by sub-contracted non-consortium members should be classified as “Sub-contracting costs”.
- **Administrative staff (staff category 4)** (including office and customer service clerks) carries out administrative tasks such as secretarial duties.

Actual remuneration modalities of staff involved in the project will be defined jointly by the participating organisations, endorsed by the managers responsible for their employment and will be part of the partnership agreement to be signed among the partners at the beginning of the project.

### TRAVEL COSTS – STAFF

Any category of staff (e.g. managers, RTT, technical and administrative staff) under official contract in the beneficiary institutions and involved in the project may benefit from financial support for travel and subsistence provided it is directly necessary to the achievement of the objectives of the project.

Travels are intended for the following activities:

- Teaching/training assignments;
- Training and retraining purposes (only eligible for staff from Partner Countries);
- Updating programmes and courses;
- Practical placements in companies, industries and institutions (only eligible for staff from Partner Countries);
- Project-management related meetings (e.g. for management, coordination, planning, monitoring and quality control activities purposes);
- Workshops and visits for result dissemination purposes.

The duration of such travels must not exceed a maximum of three months.

### TRAVEL COSTS – STUDENTS

Students (at short cycle, first cycle (Bachelor or equivalent), second cycle (Master or equivalent) and third or doctoral cycle) registered in one of the beneficiary institutions may benefit from financial support for travel and subsistence provided it supports the achievement of the project's objectives. Travels for students must take place in a participating organisation or in another organisation under the supervision of a participating organisation.

They must be targeted mainly at Partner Country students and intended for the following activities:

| Activity | Duration |
|---|---|
| ▪ Study periods in a Partner Country institution;<br>▪ Study periods in a Programme Country institution (only for students from Partner Countries);<br>▪ Participation in intensive courses organised in a Programme or Partner Country institution;<br>▪ Practical placements, internships in companies, industries or institutions in a Partner Country;<br>▪ Practical placements, internships in companies, industries or institutions in a Programme Country (only for students from Partner Countries). | Min. 2 weeks – Max. 3 months |
| ▪ Participation in short-term activities linked to the management of the project (steering committees, coordination meetings, quality control activities, etc.). | Max. 1 week |

Prior authorisation from the Executive Agency is required if the student concerned, intends to carry out activities not described above.

## EQUIPMENT

The EU grant may be used to support the purchase of equipment. Only the purchase of equipment which is directly relevant to the objectives of the project can be considered as eligible expenditure. This could include, for example, (e-)books and periodicals, fax machines, photocopying machines, computers and peripherals (including notebooks/laptops and tablettes), software, machines and equipment for teaching purposes, laboratory supplies (teaching purposes), video-projectors (hardware) and video-presentations (software), television sets, installing/setting up of communication lines for internet connection, access to databases (libraries and electronic libraries outside the partnership) and clouds, equipment maintenance, insurance, transport and installation costs.

Equipment is intended exclusively for the Partner Country Higher Education Institutions which are included in the partnership where it must be installed as soon as practically possible. The equipment must be recorded in the inventory of the institution where it is installed. This institution is the sole owner of the equipment.

- Equipment should be instrumental to the objectives of the project and should therefore be purchased at the beginning of the project implementation period and preferably not later than four months before the end of the project.

- Under no circumstances may equipment be purchased for any Programme Country institution/organisation or for non-higher education institutions in the Partner Countries.

- Hiring of equipment may be considered eligible, but only in exceptional and duly justified circumstances and provided it does not continue beyond the duration of the Grant Agreement.

- Considering the particular nature of the Capacity Building action under the Erasmus+ programme, the total purchase cost of the equipment will be taken into account and not the equipment's depreciation.

In the event of purchasing equipment over €25.000, and less than €134.000, the beneficiaries must obtain competitive tenders from at least three suppliers and retain the one offering the best value for money, observing the principles of transparency and equal treatment of the potential contractors and taking care to avoid conflicts of interests. For purchase of equipment over €134.000 national legislations will be applicable. The beneficiaries may not split the purchase of equipment into smaller contracts below the threshold.

Applicants should be aware of the fact that the procurement and delivery of equipment to Partner Country institutions is often a rather complex procedure and this should be taken into consideration at the planning stage.

## SUB-CONTRACTING

Subcontracting is intended for specific, time-bound, project-related tasks which cannot be performed by the consortium members themselves. It includes self-employed / free-lance experts. Sub-contracting to external bodies should be very occasional. The specific competences and particular expertise needed to reach the project objectives should be found in the consortium and should determine its composition. Sub-contracting for project-management related tasks is therefore not

allowed.

Typical activities which may be sub-contracted are (provided they are not carried out by beneficiaries' staff):

- Evaluation activities and auditing
- IT courses
- Language courses
- Printing, publishing and dissemination activities
- Translation services
- Web design and maintenance

In all cases, tasks to be subcontracted have to be identified in the proposal (based on relevant supporting information, along with clear reasons as to why the task cannot be carried out by the beneficiaries) and the estimated amount entered in the budget. Sub-contracting initially not foreseen in the budget will need prior written approval from the Agency during project implementation.

In the event of subcontracting over €25.000, and lower than €134.000, the beneficiaries must obtain competitive tenders from at least three suppliers and retain the one offering best value for money, observing the principles of transparency and equal treatment of potential contractors and taking care to avoid conflicts of interests. For purchase of equipment over €134.000 national legislations will be applicable. The beneficiaries may not split the purchase of services into smaller contracts below the threshold.

Subcontracting must be done on the basis of a contract, which should describe the specific task being carried out and its duration. It must include a date, project number and the signature of both parties.

Staff members of co-beneficiaries are not allowed to operate in a subcontracting capacity for the project.

The actual travel costs and costs of stay related to subcontracted service providers have to be declared under the sub-contracting budget heading and be justified and documented.

## 2. Financial reporting and Final Calculation of the Grant

For each project, the budget foreseen is laid down in the Grant Agreement and has to be used according to the provisions included therein. Projects may increase budget headings, by means of transfer from another budget heading, up to a maximum of 10% without prior authorisation, even if the increased amount exceeds the maximum ceilings for staff, equipment and sub-contracting.

Requests to increase budget headings by more than 10% must be presented in writing to the Agency and will lead to an amendment. If, as a consequence of the increase, the maximum ceilings for staff, equipment and sub-contracting costs are exceeded, the request will not be accepted.

At reporting stage, the Executive Agency will request the partners to provide information about the co-funding provided for statistical purpose.

### Staff costs

For the purposes of any financial evaluation and/or audit, beneficiaries will have to be able to justify / prove the following :

- the existence of a formal contractual relationship between the employee and the employer.
- the declared workloads are identifiable and verifiable. Evidence is required of work completed and time spent on the project (e.g. attendance lists, tangible outputs / products, compulsory time sheets);
- no justification will be asked to prove the level of expenses.

At financial reporting stage, a duly filled-in staff convention for each person engaged by the project must be attached to the project accounts and retained by the co-ordinator as supporting documents. The conventions must be signed by the person concerned, then signed and stamped by the person responsible (e.g. the dean) in the institution where this person is normally engaged. For staff performing different categories of tasks a separate convention must be signed for each type of activity.

In addition, time-sheets have to be attached to each staff convention. They must indicate:

- the date of the service provided;
- the number of days worked on these dates;
- the tasks performed (short description) in relation to the activity plan.

The time-sheets must be signed by the person concerned and countersigned by the person responsible in the institution where this person is normally engaged. Supporting documents should not be sent with the financial report at the end of the project**.** The staff conventions (with supporting time-sheets) should, however, be retained with the project accounts.

At this stage, the Executive Agency will verify the eligibility of of the activities implemented on the basis of the report sent by the co-ordinator (see Annex of the Grant Agreement- "Final Report"). If there are doubts about any particular point, the Agency may request that all the supporting documents be forwarded.

The actual contribution of the EU will be re-calculated globally for the overall project, using the unit cost approach, on the basis of the actual human resources mobilised. The EU contribution to the staff costs cannot exceed 110% of the absolute amount indicated in the grant agreement or its amendments.

### TRAVEL COSTS AND COSTS OF STAY

For the purposes of any financial evaluation and/or audit, beneficiaries will have to be able to justify / prove the following:

- the journeys are directly connected to specific and clearly identifiable project-related activities.
- the journeys actually took place (boarding pass, hotel invoices, attendance list, etc.). No justification will be requested as regards the actual costs of travels and costs of stay.

At financial reporting stage, for each journey, an Individual Mobility Report must be attached to the project accounts and retained by the co-ordinator as supporting documents. Supporting documentation will have to be attached to each mobility report in order to demonstrate the fact that the trip actually took place (e.g. travel tickets, boarding passes, invoices, receipts, attendance list). It will not be necessary to prove the actual cost of the travel.

Supporting documents should not be sent with the financial report at the end of the project. The Individual Mobility Reports should, however, be retained with the project accounts.

At this stage, the Executive Agency will verify the eligibility of the activities implemented on the basis of the report sent by the co-ordinator (see Annex of the Grant Agreement - "Final Report"). If there are doubts about any particular point, the Agency may request that all the supporting documents be forwarded.

The actual contribution of the EU will be re-calculated globally for the overall project, using the unit cost approach, on the basis of the actual human resources mobilised. The EU contribution to travel costs and costs of stay cannot exceed 110% of the absolute amount indicated in the grant agreement or its amendments.

### EQUIPMENT

For the purposes of any financial evaluation and/or audit, beneficiaries will have to be able to justify / prove the following elements:

- the declared costs are identifiable and verifiable, in particular have been recorded in the accounting system of the beneficiary.
- the equipment is properly registered in the inventory of the institution concerned.

Supporting documents should not be sent with the financial statement. The following should, however, be retained with the project accounts:

- Invoice(s) for all purchased equipment (please note that order forms, pro-forma invoices, quotations or estimates are not considered as proof of expenditure).
- When the threshold of EUR 25 000 is exceeded, documentation on the tendering procedures. In such cases, the beneficiaries may not split the purchase of equipment into smaller contracts with lower individual amounts.

At financial reporting stage, the Executive Agency will take note of the expenses on the basis of financial statements (lists of expenses) sent by the co-ordinator (see Annex of the Grant Agreement- "Final Report"). Executive Agency staff will examine these lists in detail to verify the eligibility of expenses. If there are doubts on any particular point, the Agency may request that all the supporting documents be forwarded.
Please note however, that when the total value of the invoice amounts to more than EUR 25 000, the copies (not originals) of the invoice and the comparable offers must be sent as supporting documents with the financial statement. At this stage, eligible equipment costs cannot exceed 110% of the absolute amount indicated for equipment in the grant agreement or its amendments.

### SUB-CONTRACTING

For the purposes of any financial evaluation and/or audit, beneficiaries will have to be able to justify / prove the following :

- the existence of a formal contract.
- the declared costs are identifiable and verifiable, in particular being recorded in the accounting system of the beneficiary.

Supporting documents should not be sent with the financial statement. The following should, however, be retained with the project accounts:

- Invoices, subcontracts and bank statements.
- In the case of travel activities of subcontracted service provider, individual travel reports (Annex) together with all copies of travel tickets, boarding passes, invoices and receipts, or for car travel, a copy of the internal regulations on the reimbursement rate per km. The aim of the supporting documentation is to demonstrate the actual cost of the travel and the fact that the trip actually took place.
- When the threshold of EUR 25 000 is exceeded, documentation on the tendering procedures. In such cases, the beneficiaries may not split the purchase of equipment into smaller contracts with lower individual amounts.

At financial reporting stage, the Executive Agency will take note of the expenses on the basis of financial statements (lists of expenses) sent by the co-ordinator. The Executive Agency will examine these lists in detail to verify the eligibility of expenses. If there are doubts on any particular point, the Agency may request that all the supporting documents be forwarded.
Please note however, that when the total value of the subcontract amounts to more than EUR 25,000, the copies (not originals) of the subcontract, the invoice and the comparable offers must be sent as supporting documents with the financial statement. At this stage, eligible sub-contracting costs cannot exceed 110% of the absolute amount indicated for sub-contracting in the Grant Agreement or its amendments.

### FINAL CALCULATION OF THE GRANT

At reporting stage, at the end of the project, the actual contribution of the EU will be re-calculated globally for the overall project, using the unit cost (for salaries, travels and costs of stay) and real cost (for equipment and sub-contracting) approaches, on the basis of the actual activities carried out. The EU contribution to the different budget headings cannot exceed 110% of the absolute amount indicated in the Grant Agreement or its amendments.

## 3. OTHER IMPORTANT RULES AND RECOMMENDATIONS

### PARTNERSHIP AGREEMENT

Detailed implementation modalities of the project must be agreed upon by the partners and formalised in a partnership agreement to be signed at the beginning of the project.

A copy of the partnership agreement will have to be provided to the Executive Agency within six months of the signature of the grant agreement.

This partnership agreement will have to cover the various financial, technical and legal aspects related to the implementation of the project, including:

- partners role and responsibilities;
- budget matters (co-funding, breakdown of budget per activity and partner, modalities of transfer of funds, etc.);
- remuneration policy for staff;
- reimbursement modalities for travels and costs of stay;
- reporting mechanisms;
- conflict management mechanisms, etc.

### COMPOSITION AND MODIFICATION OF THE PARTICIPATING ORGANISATIONS

Any proposed modification to the project beneficiaries must be signalled and requires prior approval by the Executive Agency. The following requirements are necessary for the different modifications to the project partnership:

- Addition of a co-beneficiary requires a mandate signed between the co-ordinator and the new co-beneficiary and acceptance letters from all other co-beneficiaries signed by the legal representative. These should be forwarded by the co-ordinator with the request.

- Withdrawal of a co-beneficiary requires written explanation from the co-ordinator and a withdrawal letter from the withdrawing co-beneficiary, signed by the legal representative. Where the minimum partnership require-

ments are no longer fulfilled, the Education, Audiovisual & Culture Executive Agency reserves the right to decide on the continuation of the agreement.

- Changes of contact person for the co-ordinator require written confirmation signed by the new contact person, the legal representative and the former contact person of the co-ordinator.

### INELIGIBLE COSTS

In addition to the ineligible costs list under Part C, the following costs shall not be considered eligible for Capacity-building projects:

- equipment such as: furniture, motor vehicles of any kind, equipment for research and development purposes, telephones, mobile phones, alarm systems and anti-theft systems;
- costs of premises (purchase, heating, maintenance, repairs etc.);
- costs linked to the purchase of real estate;
- depreciation costs.

### COMPULSORY EXTERNAL AUDIT (AUDIT CERTIFICATE)

An external audit report (audit type II) on the action's financial statement and underlying accounts must be sent with the Final Report and the required supporting documents.

The purpose of the audit is to provide Executive Agency with a reasonable assurance that the costs as well as the receipts have been declared in the Final Financial Report in accordance with the relevant legal and financial provisions of the Grant Agreement.

Each beneficiary is free to choose a qualified external auditor, including its statutory external auditor, provided that the following cumulative requirements are met:

- the external auditor must be independent from the beneficiary;
- the external auditor must be qualified to carry out statutory audits of accounting documents in accordance with national legislation implementing the Directive on statutory audits of annual accounts and consolidated accounts or any European Union legislation replacing this Directive.

A beneficiary established in a third country must comply with equivalent national regulations in the audit field.

### SUPPORTING DOCUMENTS

When required, readable copies (not originals) of the supporting documents must be sent. If there are doubts on any particular point, the Agency may request that all the supporting documents be forwarded.

Submitting the required supporting documents is an integral part of the agreement obligations and failure to submit one or more documents may lead to a request for reimbursement of the corresponding expenses.

Copies of subcontracts and invoices exceeding EUR 25 000 must be sent with the Final Report.

Quotations from at least three suppliers must be obtained for all purchases of equipment and services in excess of EUR 25 000, irrespective of the budget heading.

# ANNEX II – DISSEMINATION AND EXPLOITATION OF RESULTS

# A practical guide for beneficiaries

## INTRODUCTION

Activities serving the dissemination and exploitation of results are a way to showcase the work that has been done as part of the Erasmus+ project. Sharing results, lessons learned and outcomes and findings beyond the participating organisations will enable a wider community to benefit from a work that has received EU funding, as well as to promote the organisation's efforts towards the objectives of Erasmus+, which attaches fundamental importance to the link between Programme and policies. Therefore each of the projects supported by the Programme is a step towards achieving the general objectives defined by the Programme to improve and modernise education, training and youth systems.

Dissemination activities will vary between projects, and it is important to consider what kinds of dissemination activities are fitted to each participating organisations. Partners in smaller projects should undertake dissemination and exploitation appropriate to the level of their activity. Dissemination activities for a mobility project will trigger different requirements than those for a partnership project. The extent of dissemination and exploitation activities will increase with the size and strategic importance of the project. When applying, applicants will be asked to explain their intentions/plans for dissemination and exploitation activities, and if successful, required to carry them out.

**Section 1** defines some key terms and explains what can be achieved with dissemination and exploitation of results and how these activities will contribute to the overall objectives of the project.

**Section 2** outlines the requirements for Erasmus+ beneficiaries in terms of dissemination and exploitation of results.

# 1. Dissemination and exploitation of project results: what, why, who, when, where and how

## WHAT DO DISSEMINATION AND EXPLOITATION MEAN?

**Dissemination** is a planned process of providing information on the results of programmes and initiatives to key actors. It occurs as and when the result of programmes and initiatives become available. In terms of the Erasmus+ Programme this involves spreading the word about the project successes and outcomes as far as possible. Making others aware of the project will impact on other organisations in the future and will contribute to raising the profile of the organisation carrying out the project. To effectively disseminate results, an appropriate process at the beginning of the project needs to be designed. This should cover why, what, how, when, to whom and where disseminating results will take place, both during and after the funding period.

**Exploitation** is (a) a planned process of transferring the successful results of the programmes and initiatives to appropriate decision-makers in regulated local, regional, national or European systems, on the one hand, and (b) a planned process of convincing individual end-users to adopt and/or apply the results of programmes and initiatives, on the other hand. For Erasmus+ this means maximising the potential of the funded activities, so that the results are used beyond the lifetime of the project. It should be noted that the project is being carried out as part of an international programme working towards lifelong learning and supporting European policies in the field of education, training, youth and sport. Results should be developed in such a way that they can be tailored to the needs of others; transferred to new areas; sustained after the funding period has finished; or used to influence future policy and practice.

Dissemination and exploitation are therefore distinct but closely related to one another.

## WHAT IS INTENDED BY "RESULTS OF THE ACTIVITY"?

Results are achievements of the European activity or project that received EU funding. The type of result will vary depending on the type of project. Results can be classified as either (a) outputs or (b) outcomes:

a) Output: a tangible product which is produced by a given project and which may be quantified; outputs can be accessible products like curricula, studies, reports, materials, events, or websites;

b) Outcome: an intangible added value achieved through the achievement of the project objectives and targets. Ordinarily, such added value defies quantification, whether it covers concrete events and actions such as training, training platforms, content or methodology, or more abstract consequences such as increased awareness, increased skills or improved abilities. knowledge and experience gained by participants, partners or other stakeholders involved in the project.

## WHAT DO IMPACT AND SUSTAINABILITY MEAN?

**Impact** is the effect that the activity carried out and its results have on people, practices, organisations and systems. Dissemination and exploitation of results plans can help to maximize the effect of the activities being developed so that they will impact on the immediate participants and partners for years to come. Benefits to other stakeholders should also be considered in order to make a bigger difference and get the most from the project.

**Sustainability** is the capacity of the project to continue and use its results beyond the end of the funding period. The project results can then be used and exploited in the longer-term, perhaps via commercialisation, accreditation or mainstreaming. Not all parts of the project or results may be sustainable and it is important to view dissemination and exploitation as a progression that extends beyond the duration of the project, and into the future.

## WHAT ARE THE AIMS AND OBJECTIVES OF DISSEMINATION AND EXPLOITATION?

The first goal of dissemination and exploitation is to spread projects' results. The second goal is to contribute to the implementation and shaping of national and European policies and systems. Beneficiaries should develop their own way of achieving this goal. Developing ideas for dissemination and exploitation is important for every project funded by the Erasmus+ Programme. However, the type and intensity of dissemination and exploitation activities should be proportional and tailored to particular needs and type of project developed. This includes whether the project is process-oriented or aimed at producing tangible deliverables; if it is stand alone or part of a larger initiative; whether it is developed by large or small-scale participating organisations, etc. Participating organisations should discuss the aims and objectives of the activities/plan and decide on the best activities and approaches as well as share the tasks among partners taking into account the particular specifics of the project.

For structured cooperation projects such as Strategic Partnerships, Knowledge Alliances, Sport, Collaborative Partnerships and Capacity-building projects, a good quality dissemination and exploitation plan should include measurable and realistic objectives, a detailed timetable and provide a resource planning for the activities to be undertaken. Involving target groups in activities will also help to maximise the use of the project's results. It is important to set the strategy right from the beginning as this is the main way that will foster communication with the target audiences. Such a requirement is not foreseen for mobility projects. However, project organisers are invited to communicate the learning outcomes reached by participants in such activities. They should also encourage participants to share with others what they have gained from taking part in the mobility activity. Finally, the dissemination part of the Programme is also supposed to raise the quality of the Programme by stimulating innovative projects and sharing good practices.

Communication is a broader concept. It includes information and promotion activities to raise awareness and enhance the visibility of the project's activities in addition to the dissemination and exploitation of the project results. However, very often it is difficult to make a clear distinction between these areas. For this reason, planning an overall strategy framework covering both fields can be a more efficient way to make the most of the available resources. Dissemination and exploitation of results should form a crucial part of any communication activities taking place during the project's lifetime.

## WHY IS IT IMPORTANT TO SHARE PROJECT RESULTS? WHAT ARE THE WIDER BENEFITS?

Taking the time to develop a comprehensive dissemination and exploitation plan will be advantageous for both the beneficiary and its partners. As well as raising the profile of the organisation, dissemination and exploitation activities can often create new opportunities to extend the project and its results or develop new partnerships for the future. Successful dissemination and exploitation may also lead to external recognition of the work carried out adding further credit to it. Sharing the results will enable others to benefit from the activities and experiences of the Erasmus+ Programme. Project results can serve as examples and inspire others by showing what is possible to achieve under the Programme.

Dissemination and exploitation of project results can help to inform future policy and practice. Dissemination and exploitation of results activities carried out by beneficiaries will support the wider aim of improving the European Union's systems. The impact of the Erasmus+ Programme is measured not only by the quality of project results but also by the extent to which these results are known and used outside the project partnership. By reaching out to as many potential users as possible through effective dissemination, this will help to achieve a return on investment.

The dissemination and exploitation of project results also increases awareness of the opportunities offered by the Programme and highlights the European added value of activities supported by Erasmus+. This can contribute to a positive public perception and encourage wider participation in this new EU Programme. It is fundamental to consider the aims and objectives of the dissemination and exploitation plan. These should link to the project aims to ensure that the methods and approaches used are appropriate for the Erasmus+ project and its results, as well as for the identified target audiences. Dissemination and exploitation goals may be to:

- raise awareness;
- extend the impact;
- engage stakeholders and target groups;
- share solutions and know how;
- influence policy and practice;
- develop new partnerships.

## WHAT CAN BE DISSEMINATED AND EXPLOITED?

The next step is to identify **what** to disseminate and exploit. The results of the project may be of diverse nature and consist of both concrete (tangible) results as well as of skills and personal experiences that both project organisers and participants to the activities have acquired (intangible results).

**Tangible results** may include for example:

- an approach or a model to solve a problem;
- a practical tool or product, such as handbooks, curricula, e-learning tools;
- research reports or studies;
- good practice guides or case studies;
- evaluation reports;
- recognition certificates;
- newsletters or information leaflets.

In order to disseminate more widely experiences, strategies, processes, etc, it is recommended to document them.

**Intangible results** may include for example:

- knowledge and experience gained by participants, learners or staff;
- increased skills or achievements;
- improved cultural awareness;
- better language skills.

Intangible results are often more difficult to measure. The use of interviews, questionnaires, tests, observations or self-assessment mechanisms may help to record this type of result.

## WHO ARE THE TARGET AUDIENCES?

Identifying target groups, both at different geographical levels (local, regional, national, European) and in the own field of the beneficiary (colleagues, peers, local authorities, other organisations leading the same type of activity, networks, etc.) is essential. Activities and messages have to be tailored appropriately taking into account audiences and target groups, for example:

- end-users of the project activities and deliverables;
- stakeholders, experts or practitioners in the field and other interested parties;
- decision-makers at local, regional, national and European level;
- press and media;
- general public.

The project plans should be flexible enough to allow target groups and other stakeholders to become involved during the different stages of the project. This will help to ensure that the project remains on track in terms of their needs. Their participation will also highlight the potential value of your project as well as help to spread the news to other interested parties throughout Europe.

## HOW TO DISSEMINATE AND EXPLOIT RESULTS?

In order to reach as many people as possible, it is advisable to translate as many communication materials and project outputs in as many languages as possible. It is recommended to cover all languages of the partnership and English; the cost of these translations could be included in the grant request if necessary.

There are many different ways to disseminate and exploit results. Being creative and thinking of fresh ideas so that the Erasmus+ project and results really stand out will be appreciated. Beneficiaries could use:

- the Erasmus+ Project Results Platform (see below);
- project or organisational websites;
- meetings and visits to key stakeholders;
- dedicated discussion opportunities such as information sessions, workshops, (online) seminars, training courses, exhibitions, demonstrations, or peer reviews;
- targeted written material such as reports, articles in specialised press, newsletters, press releases, leaflets or brochures;
- audiovisual media and products such as radio, TV, YouTube, Flickr, video clips, podcasts or apps;
- social media;
- public events;
- project branding and logos;
- existing contacts and networks.

In terms of exploitation it is important to think about how results can make a difference to the project, end- users, peers or to policy makers. Exploitation mechanisms include:

- positive reputational effects for the participating organisations;
- increased awareness on a theme, target or area of work;
- increased financial support by other supporters or donors;
- increased influencing on policy and practice.

## WHEN SHOULD DISSEMINATION AND EXPLOITATION ACTIVITIES BE CARRIED OUT?

Dissemination and exploitation of results are an integral part of the Erasmus+ project throughout its lifetime: from the beneficiary's initial idea, during the project and even after European funding has ended.
Setting up a timetable of activities together with the partners involved and allocating appropriate budget and resources is necessary. The plan shall:

- agree realistic targets and deadlines with partners to monitor progress;
- align dissemination and exploitation activities with key stages of the project;
- offer sufficient flexibility to respond to the needs of the target group as well as wider developments in policy and practice.

Examples of activities at different stages of the project cycle are:

**BEFORE** the project starts

- drafting the dissemination and exploitation plan;
- definition of the expected impact and deliverables;
- consideration of how and to whom dissemination and exploitation outcomes will be disseminated.

**DURING** the project

- contacting relevant media e.g. at local or regional level;
- conducting regular activities such as information sessions, training, demonstrations, peer reviews;
- assessing the impact on target groups;
- involving other stakeholders in view of transferring results to end users/ new areas/policies.
- adding a banner with a link to project card within the Erasmus+ Project Platform on the project website

**AT FINAL REPORT STAGE**

- uploading the final project results and an update of the project description on the Erasmus+ Project Results Platform.

**AFTER** the project

- continuing further dissemination (as described above);
- developing ideas for future cooperation;
- evaluating achievements and impact;
- contacting relevant media;
- contacting policy-makers if relevant
- cooperate with the European Commission by providing useful inputs to its dissemination and exploitation efforts.

## HOW TO ASSESS SUCCESS?

The impact assessment is an essential part of the process. It evaluates achievements and generates recommendations for future improvements. Indicators could be used to measure progress towards goals. These are signs that help to measure performance. Indicators can be both quantitative relating to numbers and percentages as well as qualitative relating to the quality of the participation and experience. Questionnaires, interviews, observations and assessments could also be used to measure the impact. Defining indicators relating to the different project activities should be foreseen at the start of the project and part of the overall dissemination plan.

Some examples:

- Facts and figures related to the website of project organisers (updates, visits, consultation, cross referencing);
- Numbers of meetings with key stakeholders;
- Numbers of participants involved in discussions and information sessions (workshops, seminars, peer reviews); follow-up measures;
- Production and circulation of products;
- Media coverage (articles in specialised press newsletters, press releases, interviews, etc.);
- Visibility in the social media and attractiveness of website;
- Participation in public events;
- Links with existing networks and transnational partners; transfer of information and know-how;
- Impact on regional, national, EU policy measures;
- Feedback from end-users, other stakeholders, peers, policy-makers

# 2. REQUIREMENTS IN TERMS OF DISSEMINATION AND EXPLOITATION

## GENERAL QUALITATIVE REQUIREMENTS

Depending on the action, applicants for funding under Erasmus+ are required to consider dissemination and exploitation activities at the application stage, during their activity and after the activity has finished. This section gives an overview of the basic requirements laid down in the official documentation of the Erasmus+ Programme.

Dissemination and exploitation is one of the award criteria on which the application will be assessed. Depending on the project type, it will be given a different weight in the assessment of the application.

- For mobility projects, listing planned dissemination activities and identifying potential target groups will be requested in the application form.
- For cooperation projects, a detailed and comprehensive plan, describing targets, tools and outcomes will be requested and further assessed. Although generally one partner will take the responsibility for dissemination and exploitation coordination for the whole project, the responsibility for implementation should be shared among all partners. Each partner will be involved in these activities according to the needs and roles in the project.

For all project types, reporting on the activities carried out to share the results inside and outside participating organisations will be requested at final stage.

## VISIBILITY OF THE EUROPEAN UNION AND OF THE ERASMUS+ PROGRAMME

Beneficiaries shall always use the European emblem (the 'EU flag') and the name of the European Union spelled out in full in all communication and promotional material. The preferred option to communicate about EU funding through the Erasmus+ Programme is to write 'Co-funded by the Erasmus+ Programme of the European Union' next to the EU emblem.

Examples of acknowledgement of EU funding and translations of the text are available at http://eacea.ec.europa.eu/about-eacea/visual-identity_en

The brand name of 'Erasmus+' shall not be translated.

Guidelines for beneficiaries on the use of the EU emblem in the context of EU programmes are available at http://ec.europa.eu/dgs/communication/services/visual_identity/pdf/use-emblem_en.pdf

## USE OF THE ERASMUS+ PROJECT RESULTS PLATFORM

An Erasmus+ Project Results Platform was established to offer a comprehensive overview of projects funded under the Programme and to highlight good practice examples and success stories. The platform also makes available products/deliverables/intellectual outputs which are the result of the projects funded.

Good practice examples are the object of an annual selection by each National Agency and by the Executive Agency. Success stories are selected from among the good practice examples at central level by DG EAC.

The Erasmus+ Project Results Platform serves different purposes:

- Transparency, as it provides a comprehensive overwiew of all projects funded under the programme (including project summaries, funding figures, URL links, etc.);
- Accountability, as it gives access to end-users and practitioners to project results;
- Inspiration, as it showcases good practices and success stories among Erasmus+ beneficiaries selected every year at national and European level.

For most Erasmus+ projects, beneficiaries are required to provide a summary describing their project in English at application stage.

The project summary is of particular importance as it provides a description for the general public. It should therefore be drafted in plain language and clear style so that the actual content of the project can be quickly understood, also by outsiders.

The following elements should be part of the summary: context/background of the project; objectives of the project; number and profile of participants; description of activities; methodology to be used in carrying out the project; a short description of the results and impact envisaged; the potential longer-term benefits.

The Erasmus+ Project Results Platform can be consulted at: http://ec.europa.eu/programmes/erasmus-plus/projects/

# ANNEX III – GLOSSARY OF TERMS

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| **Accompanying person** | as a general definition applying to all fields of education training and youth, an accompanying person is the one who accompanies participants – whether learners or staff/youth workers - with special needs (i.e. with disabilities) in a mobility activity, in order to ensure protection, provide support and extra assistance.<br>Additionally, in the case of<br>- VET learners and volunteering activities under Key Action 1,<br>- Short or long term pupils' mobility and blended mobility of young people under Key Action 2,<br>- Meetings between young people and decision makers under Key Action 3,<br>an accompanying person may also be the adult that accompanies one or several VET learners, volunteers with fewer opportunities, school pupils or young people (especially minors or youngsters with little experience outside their own country) abroad, to ensure their protection and safety as well as their effective learning during the mobility experience. |
| **Accreditation** | process that ensures that the organisations wishing to receive funding under an Action of the Erasmus+ Programme respect a set of qualitative standards or pre-requisites defined by the European Commission for that given Action. Depending on the type of Action or on the country where the requesting organisation is located, the accreditation is carried out by the Executive Agency, a National Agency or a SALTO Resource Centre. The accreditation process is in place for organisations wishing to participate in higher education projects (including mobility) or in mobility activities in the field of youth. |
| **Action** | a strand or measure of the Erasmus+ Programme. Examples of Actions are: Strategic Partnerships in the field of education, training and youth, Erasmus Mundus Joint Master Degrees, Sectors Skills Alliances, etc. |
| **Activity** | a set of tasks carried out as part of a project. An activity can be of different types (mobility activities, cooperation activities, etc.). In the framework of Jean Monnet, an Activity is equivalent to an Action (see definition above). |
| **Adult education** | all forms of non-vocational adult education, whether of a formal, non-formal or informal nature (for continuous vocational training see "VET"). |
| **Adult education organisation** | any public or private organisation active in the field of non-vocational adult learning. |
| **Adult learner** | any person who, having completed or is no longer involved in initial education or training, returns to some forms of continuing learning (formal, non-formal or informal), with the exception of school and VET teachers/trainers. . |
| **Advance Planning Visit (APV)** | Planning visit to the country of the receiving organisation(s) ahead of Youth Exchanges or Volunteering activities in Youth mobility projects and ErasmusPro activities in VET learners mobility projects. The purpose of the APVs is to ensure high quality activities by facilitating and preparing administrative arrangements, building trust and understanding and setting-up a solid partnership between organisations involved. In case of youth mobility projects, young participants can also be involved in the visit to integrate them fully in the project design. |
| **Affiliated entity** | The following can be considered Affiliated Entities (in accordance with Art. 122 of the Financial Regulation):<br>• legal entities having a legal or capital link with beneficiaries; this link is neither limited to the action nor established for the sole purpose of its implementation;<br>• several entities which satisfy the criteria for being awarded a grant and together form one entity which may be treated as the sole beneficiary, including where the entity is specifically established for the purpose of implementing the action.<br>The Affiliated Entities must comply with the eligibility and non-exclusion criteria, and where applicable also with the selection criteria applying to applicants. |

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| **Applicant** | participating organisation or informal group that submits grant application. Applicants may apply either individually or on behalf of a other organisations involved in the project. In the latter case, the applicant is also defined as coordinator. |
| **(Application) deadline** | final date by when the application form must be submitted to the National or Executive Agency to be considered eligible. |
| **Apprenticeship (Apprentice)** | apprenticeship-type schemes are understood as those forms of Initial Vocational Education and Training (IVET) that formally combine and alternate company based training (periods of practical work experience at a workplace) with school based education (periods of theoretical/practical education followed in a school or training centre), and whose successful completion leads to nationally recognised initial VET qualifications. |
| **Basic skills** | literacy, mathematics, science & technology; these skills are included in the key competences. |
| **Beneficiary** | if the project is selected, the applicant becomes beneficiary of an Erasmus+ grant. The beneficiary sings a grant agreement with – or is notified of a grant decision by – the National or Executive Agency that has selected the project. If the application was made on behalf of other participating organisations, the partners may become co-beneficiaries of the grant. |
| **Blended learning** | study type that involves learning in a combination of modes. Often used more specifically to refer to courses which use a combination of traditional face-to-face teaching work-shops or seminars, and distance learning techniques on-line (such as internet, television, conference calls). |
| **Call for proposals** | invitation published by or on behalf of the Commission to present, within a given deadline, a proposal for action that corresponds to the objectives pursued and fulfils the required conditions. Calls for proposals are published in the Official Journal of the European Union (C series) and/or at relevant websites of the Commission, National or Executive Agency. |
| **Certificate** | in the context of Erasmus+, a document issued to a person having completed a learning activity in the field of education, training and youth, where relevant. Such document certifies the attendance and, where applicable, the learning outcomes of the participant in the activity. |
| **Clerical Error** | a minor mistake or inadvertence unintentionally made in a document that changes its meaning, such as a typographical error or the unintentional addition or omission of a word, phrase, or figure. |
| **Co-financing** | the co-financing principle implies that part of the costs of a project supported by the EU must be borne by the beneficiary, or covered through external contributions other than the EU grant. |
| **Company** | legal persons established under civil or commercial law, including cooperative societies, and other legal persons governed by public or private law, except those which are non-profit-making. |
| **Consortium** | two or more participating organisations teaming up to prepare, implement and follow up a project or an activity within a project. A consortium can be national (i.e. involving organisations established in the same country) or international (involving participating organisations from different countries). |
| **Coordinator/Coordinating organisation** | a participating organisation applying for an Erasmus+ grant on behalf of a consortium of partner organisations. |
| **Credit mobility** | a limited period of study or traineeship abroad - in the framework of on-going studies at a home institution - for the purpose of gaining credits. After the mobility phase, students return to their home institution to complete their studies. |
| **Credit** | a set of learning outcomes of an individual which have been assessed and which can be accumulated towards a qualification or transferred to other learning programmes or qualifications. |
| **Degree mobility** | period of study abroad aimed at the acquisition of a whole degree or certificate in the destination country/ies. |

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| **Diploma Supplement** | an annex to the official qualification documentation, which is designed to provide more detailed information on the studies completed according to an agreed format which is internationally recognized a document accompanying a higher education diploma, providing a standardised description of the nature, level, context, content and status of the studies completed by its holder. It is produced by higher education institutions according to standards agreed by the European Commission, the Council of Europe and UNESCO. The Diploma Supplement is part of Europass (see below). In the context of an international joint study programme, it is recommended to deliver a "joint diploma supplement" covering the entire programme and endorsed by all the degree awarding universities. |
| **Double degree/multiple degree** | a study programme offered by at least two (double) or more (multiple) higher education institutions whereby the student receives, upon completion of the study programme, a separate degree certificate from each of the participating institutions. |
| **Dual career** | the combination of high-level sports training with general education or work. |
| **ECHE (Erasmus Charter for Higher Education)** | an accreditation granted by the European Commission giving the possibility to higher education institutions from Programme Countries to be eligible to apply and participate in learning and cooperation activities under Erasmus+. 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. |
| **ECTS (European Credit Transfer and Accumulation System)** | a learner-centred system for credit accumulation and transfer, based on the transparency of learning, teaching and assessment processes. Its objective is to facilitate planning, delivery and evaluation of study programmes and learner mobility through the recognition of qualifications and periods of learning. a system that helps to design, describe and deliver study programmes and award higher education qualifications. The use of ECTS, in conjunction with outcomes-based qualifications frameworks, makes study programmes and qualifications more transparent and facilitates the recognition of qualifications. |
| **ECVET (European Credit System for Vocational Education and Training)** | a system that aims to facilitate the validation, recognition and accumulation of work-related skills and knowledge acquired during a stay in another country or in different situations. ECVET aims for better compatibility between the different vocational education and training systems in place across Europe and their qualifications. It should create a technical framework to describe qualifications in terms of units of learning outcomes, and it includes assessment, transfer, accumulation and recognition procedures. |
| **Enterprise** | any undertaking engaged in an economic activity regardless of its size, legal form or of the economic sector in which it operates. |
| **EQAVET (European Quality Assurance Reference Framework for Vocational Education and Training)** | a reference tool for policy-makers based on a four-stage quality cycle that includes goal setting and planning, implementation, evaluation and review. It respects the autonomy of national governments and is a voluntary system to be used by public authorities and other bodies involved in quality assurance. |
| **EQF (European Qualifications Framework)** | a common European reference tool that serves as a translation device between different education and training systems and their levels. It aims to improve the transparency, comparability and portability of qualifications across Europe, promoting workers' and learners' mobility and facilitating their lifelong learning, as defined in the 2008/C 111/01 Recommendation of the European Parliament and the Council. |
| **ESCO (multilingual classification of European Skills, Competences, Qualifications and Occupations)** | identifies and categorises skills and competences, qualifications and occupations relevant for the EU labour market and education and training, in 25 European languages. The system provides occupational profiles showing the relationships between occupations, skills, competences and qualifications. ESCO has been developed in an open IT format and is available for everyone to use free of charge. |
| **Established** | relates to an organisation or body fulfilling certain national conditions (registration, statement, publication, etc.) that allow such organisation or body to be formally recognized by its national authority. In case of an informal group of young people, the legal residence of its legal representative is considered as having the equivalent effects for the purposes of eligibility to an Erasmus+ grant. |

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| **Europass** | Europass is a portfolio of five different documents and an electronic folder aiming to contain descriptions of the entire holder's learning achievements, official qualifications, work experience, skills and competences, acquired over time. These documents are: the Europass CV, the Diploma Supplement, the Certificate Supplement, the Europass Mobility and the Language Passport. Europass also includes the European Skills Passport, a user-friendly electronic folder that helps the holder to build up a personal, modular inventory of his/her skills and qualifications. The aim of Europass is to facilitate mobility and improve job and lifelong learning prospects in Europe. |
| **European Development Plan** | for VET, schools and adult education organisations, a document outlining the needs of the institution/organisation in terms of quality development and internationalisation, and how the planned European activities will meet those needs. The European Development Plan is part of the application form for schools and adult education organisations applying for learning mobility of staff under Key Action 1. |
| **European Youth NGO** | NGO that: operates through a formally recognised structure, composed of a) European body/secretariat (the applicant) legally established for at least one year in a Programme Country on the date of submission of the application and b) national organisations/branches in at least twelve Programme Countries having a statutory link with the European body/secretariat; 2) is active in the field of youth and runs activities that support the implementation of the fields of action of the EU Youth Strategy; 3) involves young people in the management and governance of the organisation. |
| **Force majeure** | an unforeseeable exceptional situation or event beyond the participant's control and not attributable to error or negligence on his/her part. |
| **Grassroots sport** | organised sport practised at local level by amateur sportspeople, and sport for all. |
| **Group Leader** | in youth mobility projects, a group leader is an adult who joins the young people participating in a Youth Exchange in order to ensure their effective learning (Youthpass), protection and safety. |
| **Groups of young people active in youth work but not necessarily in the context of a youth organisation (also informal groups of young people)** | group of at least four young people which does not have legal personality under the applicable national law, provided that their representatives have the capacity to undertake legal obligations on their behalf. These groups of young people can be applicants and partners in some Actions of Erasmus+. For the purpose of simplification, they are assimilated to legal persons (organisations, institutions, etc.) in this Guide and fit within the notion of Erasmus+ participating organisations for the Action in which they can take part. The group must be composed of at least four young persons and their age should be according with the overall age of the young people in the programme (13-30). In exceptional cases and if all young people are minors, the group could be represented by an adult. This would allow a group of young people (where all are minors) with a help of a youth worker/coach to submit an application. |
| **Higher education institution** | any type of higher education institution which, in accordance with national law or practice, offers recognised degrees or other recognised tertiary level qualifications, whatever such establishment may be called, or any institution which, in accordance with national law or practice, offers vocational education or training at tertiary level. |
| **Higher education modernisation agenda** | strategy of the European Commission aimed to support Member States' reforms and contribute to the goals of Europe 2020 in the field of higher education. The main areas for reform identified in the new agenda are: to increase the number of higher education graduates; to improve the quality and relevance of teaching and researcher training, to equip graduates with the knowledge and core transferable competences they need to succeed in high-skill occupations; to provide more opportunities for students to gain additional skills through study or training abroad, and to encourage cross-border co-operation to boost higher education performance; to strengthen the "knowledge triangle", linking education, research and business and to create effective governance and funding mechanisms in support of excellence. |
| **Informal groups of young people** | see the definition of "groups of young people active in youth work but not necessarily in the context of a youth organisation" above. |

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| **Informal learning** | learning resulting from daily activities related to work, family or leisure which is not organised or structured in terms of objectives, time or learning support; it may be unintentional from the learner's perspective. |
| **International** | in the context of Erasmus+, relates to any action involving at least one Programme Country and at least one Partner Country. |
| **Job Shadowing** (practical learning experience) | a short stay at a partner organisation in another country with the aim of receiving training by following practitioners in their daily work in the receiving organisation, exchanging good practices, acquiring skills and knowledge and/or building long-term partnerships through participative observation. |
| **Joint degree** | single degree certificate awarded to a student upon completion of a joint programme. The joint degree must be signed by the competent authorities of two or more of the participating institutions jointly and recognised officially in the countries where those participating institutions are located. |
| **Joint programmes** | higher education (study or research) programmes jointly designed, delivered and fully recognised by two or more higher education institutions. Joint programmes can be implemented at any higher education level, i.e. bachelor, master or doctorate. Joint programmes can be national (i.e. when all universities involved are from the same country) or transnational/international (i.e. when at least two different countries are represented among the higher education institutions involved). |
| **Key competences** | the basic set of knowledge, skills and attitudes which all individuals need for personal fulfilment and development, active citizenship, social inclusion and employment, as described in Recommendation 2006/962/EC of the European Parliament and of the Council. |
| **Learning mobility** | moving physically to a country other than the country of residence, in order to undertake study, training or non-formal or informal learning; it may take the form of traineeships, apprenticeships, youth exchanges, volunteering, teaching or participation in a professional development activity, and may include preparatory activities, such as training in the host language, as well as sending, receiving and follow-up activities. |
| **Learning outcomes** | statements of what a learner knows, understands and is able to do on completion of a learning process, which are defined in terms of knowledge, skills and competence . |
| **Lifelong learning** | all general education, vocational education and training, non-formal learning and informal learning undertaken throughout life, resulting in an improvement in knowledge, skills and competences or participation in society within a personal, civic, cultural, social and/or employment-related perspective, including the provision of counselling and guidance services. |
| **Mentoring** | measures for personal support that are provided to volunteers, next to the task related support measures. Main responsible for mentoring is a mentor, appointed by the Receiving or the Coordinating Organisation. Mentoring consist of having regular meetings to follow up on the personal wellbeing of the volunteer within as well as outside the Receiving Organisation. Mentoring is targeted towards the individual volunteer and thus the content and frequency of the meetings will vary according to the individual needs. Possible topics of mentoring meetings: personal wellbeing, wellbeing in the team, satisfaction with the tasks, practicalities etc. |
| **Mobility/Learning agreement** | an agreement between the sending and receiving organisation, as well as the participating individuals, defining the aims and the content of the mobility period in order to ensure its relevance and quality. It can also be used as a basis for the recognition of the period abroad by the receiving organisation. |
| **Month** | in the context of the Erasmus+ Programme and for the purpose of calculating the grants, a month is equal to 30 days. |

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| **MOOC** | An abbreviation for "Massive Open Online Course," a type of course that is completely delivered online, is open to be accessed by anyone without cost, entry qualifications or other restrictions and often have large participant numbers. They can have in-person components, e.g. encouraging local participant meetings, and formal assessment, but tend to use peer review, self-assessment and automated grading. There are many variations of MOOCs, e.g. focused on specific sectors, target groups (e.g. vocational focus, teachers, etc.) or teaching methods. MOOCs funded under Erasmus+ have to be open for all and both the participation and a certificate or badge of completion are free of charge for participants. Please note that the open access requirement for educational resources applies also to MOOCs and other complete courses. |
| **Non-formal learning** | learning which takes place through planned activities (in terms of learning objectives and learning time) where some form of learning support is present, but which is not part of the formal education and training system. |
| **Occupational profile** | the set of skills, competences, knowledge and qualifications that is usually relevant for a specific occupation . |
| **One-cycle study programmes** | integrated/long programmes leading either to a first or a second-cycle degree and which, in some countries, can still be better characterised by duration in years rather than credits. In most of these countries, the programmes outside the Bologna first-cycle model are in the fields of medicine, dentistry, veterinary medicine, nursing and midwifery and in most cases involve 1-8 % of the student population. The typical length of integrated programmes leading to regulated professions is in general 300-360 ECTS/five-six years depending on the regulated profession in question. |
| **Open Access** | A general concept of publishing materials of a specific kind openly, i.e. to be accessible and usable by the largest possible user group and for the largest number of use cases. Erasmus+ has an Open Access Requirement for educational resources and encourages Open Access of research results and data. |
| **Open Educational Resources (OER)** | educational materials of any kind (e.g. textbooks, worksheets, lesson plans, instructional videos, entire online courses, educational games) which can be freely used, adapted and shared. OER have either been released under an open license or are in the public domain (i.e. copyright protection has expired). Cost-free materials that cannot be adapted and shared by the public are not OER. |
| **Open licence** | a way for copyright holders (creators or other rightholders) to grant the general public the legal permission to freely use their work; in the context of the Erasmus+ Open Access Requirement, the applied open license must permit at least use, adaptation and distribution. The open license should be indicated on the work itself or wherever the work is distributed. Educational materials with an open license are called Open Educational Resources (OER). |
| **Open Method of Coordination** | an intergovernmental method providing a framework for cooperation between the EU Member States, whose national policies can thus be directed towards certain common objectives. Within the scope of the Programme, the OMC applies to education, training and youth. |
| **Participants** | in the context of Erasmus+ participants are considered those individuals fully involved in a project and, in some cases, receiving part of the European Union grant intended to cover their costs of participation (notably travel and subsistence). Under certain Actions of the Programme (i.e. Strategic Partnerships) a distinction is hence to be made between this category of participants (direct participants) and other individuals indirectly involved in the project (e.g. target groups). |
| **Participating organisation** | any organisation or informal group of young people involved in the implementation of an Erasmus+ project. Depending on their role in the project, participating organisations can be applicants or partners (also defined as co-applicants, if they are identified at time of submission of the grant application). If the project is granted, applicants become beneficiaries and partners may become co-beneficiaries if the project is financed through a multi-beneficiary grant. |
| **Partner (organisation)** | participating organisation involved in the project but not taking the role of applicant. |

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| **Partner Countries** | countries which do not participate fully in the Erasmus+ Programme, but which may take part (as partners or applicants) in certain Actions of the Programme. The list of Erasmus+ Partner Countries is described in Part A of this Guide, section "Who can participate in the Erasmus+ Programme". |
| **Partnership** | an agreement between a group of participating organisations in different Programme Countries to carry out joint European activities in the fields of education, training, youth and sport or establishing a formal or informal network in a relevant field such as joint learning projects for pupils and their teachers in the form of class exchanges and individual long-term mobility, intensive programmes in higher education and cooperation between local and regional authorities to foster inter-regional, including cross-border, cooperation; it may be extended to institutions and/or organisations from Partner Countries with a view to strengthening the quality of the partnership. |
| **People with fewer opportunities** | persons facing some obstacles that prevent them from having effective access to education, training and youth work opportunities. A more detailed definition of people with fewer opportunities can be found in Part A of this Guide - section "Equity and inclusion". |
| **People with special needs** | a person with special needs is a potential participant whose individual physical, mental or health-related situation is such that his/her participation in the project or mobility activity would not be possible without extra financial support. |
| **Profit-making body active in Corporate Social Responsibility** | a private company that a) carries out its business in compliance with ethical standards and/or b) on top of its business activities, carries out some actions that have social value. |
| **Programme Countries** | EU and non EU countries that have established a National Agency which participate fully in the Erasmus+ Programme. The list of Erasmus+ Programme Countries is described in Part A of this Guide, section "Who can participate in the Erasmus+ Programme". |
| **Project** | a coherent set of activities which are organised in order to achieve defined objectives and results. |
| **Qualification** | a formal outcomes of an assessment and validation process which is obtained when a competent body determines that an individual achieved learning outcomes to given standards. |
| **Receiving organisation** | under some Actions of Erasmus+ (notably mobility Actions) the receiving organisation is the participating organisation receiving one or more participants and organising one or more activities of an Erasmus+ project. |
| **Reinforced Mentorship** | Reinforced Mentorship is the intensified Mentoring process that is necessary to support young people with fewer opportunities, if they are not able to implement a volunteering activity independently/with regular mentoring or tutoring support. Reinforced Mentorship involves closer contact to and more meetings with the volunteer as well as allowing more time to implement the tasks of regular mentoring, guaranteeing a step by step support for the volunteers during project activities as well as outside of working hours. Reinforced Mentorship is targeted at successful implementation of the project and at enabling the volunteer to gain as much autonomy in this as possible. |
| **School** | an institution providing general, vocation or technical education, on any level from pre-school to upper secondary education. Please consult the list of types of institutions defined as schools in each country; for more information contact the National Agency in the country. |
| **Sending organisation** | under some Actions of Erasmus+ (notably mobility Actions) the sending organisation is the participating organisation sending one or more participants to an activity of an Erasmus+ project. |

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| **Short cycle (or short-cycles higher education - SCHE) qualifications** | in most countries it is within the first cycle in the Qualifications Framework for the European Higher Education Area (ISCED Level 5). They are typically represented by approximately 120 ECTS credits within national contexts, leading to a qualification that is recognised at a lower level than a degree at the end of the first cycle. Some programmes are longer than three years but typically will not give more than 180 ECTS credits. In the majority of countries students can use most of the credits earned in SCHE to progress to degree courses. The descriptors of the short cycle correspond to the learning outcomes of EQF level 5. |
| **SMEs (Small and medium-sized enterprises)** | enterprises (see definition above) which employ fewer than 250 persons and which have an annual turnover not exceeding 50 million EUR, and/or an annual balance sheet total not exceeding 43 million EUR. |
| **Social enterprise** | an undertaking, regardless of its legal form, which is not listed on a regulated market within the meaning of point (14) of Article 4(1) of Directive 2004/39/EC, and which: 1) in accordance with its articles of association, statutes or any other statutory document establishing the business, has as its primary objective the achievement of measurable, positive social impacts rather than generating profit for its owners, members and stakeholders, where the undertaking: a) provides innovative services or goods which generate a social return and/or b) employs an innovative method of production of goods or services and that method of production embodies its social objective; 2) reinvests its profits first and foremost to achieve its primary objective and has in place predefined procedures and rules for any circumstances in which profits are distributed to shareholders and owners, in order to ensure that any distribution of profits does not undermine the primary objective; 3) is managed in an entrepreneurial, accountable and transparent way, in particular by involving workers, customers and/or stakeholders affected by its business activities. |
| **Staff** | persons who, on either a professional or a voluntary basis, are involved in education, training or youth non-formal learning, and may include professors, teachers, trainers, school leaders, youth workers and non-educational staff. |
| **Structured dialogue** | dialogue with young people and youth organisations and decision makers which serves as a forum for continuous joint reflection on the priorities, implementation and follow-up of European cooperation in the youth field. |
| **Third cycle** | the third cycle level in the Qualifications Framework for the European Higher Education Area agreed by the ministers responsible for higher education at their meeting in Bergen in May 2005 in the framework of the Bologna process. The descriptor of the third cycle of the QF EHEA corresponds to the learning outcomes for EQF level 8. |
| **Traineeship (work placement)** | spending a period of time in an enterprise or organisation in another country, with a view to acquire specific competences that are required by the labour market, carry out work experience and improve the understanding of the economic and social culture of that country. |
| **Transnational** | relates, unless otherwise indicated, to any action involving at least two Programme Countries. |
| **Transversal (soft; life) skills** | include the ability to think critically, be curious and creative, to take initiative, to solve problems and work collaboratively, to be able to communicate efficiently in a multicultural and interdisciplinary environment, to be able to adapt to context, to cope with stress and uncertainty; these skills are part of the key competences |
| **Union transparency and recognition tools** | instruments that help stakeholders to understand, appreciate and, as appropriate, recognise learning outcomes and qualifications throughout the Union. |
| **Validation of non-formal and informal learning** | a process of confirmation by an authorised body that an individual has acquired learning outcomes measured against a relevant standard and consists of the following four distinct phases:<br>1.Identification through dialogue of particular experiences of an individual;<br>2.Documentation to make visible the individual's experiences;<br>3.A formal assessment of these experiences; and<br>4.Certification of the results of the assessment which may lead to a partial or full qualification |

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| **Vocational education and training (VET)** | education and training which aims to equip people with knowledge, know-how, skills and/or competences required in particular occupations or more broadly on the labour market. For the purpose of Erasmus+ projects focusing on initial or continuing vocational education and training are eligible under VET actions. |
| **Virtual mobility** | a set of activities supported by Information and Communication Technologies, including e-learning, that realise or facilitate international, collaborative experiences in a context of teaching, training or learning. |
| **Workplace learning** | Study type which involves the acquisition of knowledge, skills and competences through carrying out – and reflecting on – tasks in a vocational context, either at the workplace (such as alternance training) or in a vocational education and training institution |
| **Young people** | In the context of the Erasmus+ Programme, individuals aged between 13 and 30. |
| **Youth activity** | an out-of-school activity (such as youth exchange, volunteering or youth training) carried out by a young person, either individually or in a group, in particular through youth organisations, and characterised by a non-formal learning approach. |
| **Youth worker** | a professional or a volunteer involved in non-formal learning who supports young people in their personal socio-educational and professional development. |
| **Youthpass** | the European tool to improve the recognition of the learning outcomes of young people and youth workers from their participation in projects supported by the Erasmus+ Programme. Youthpass consists of: a) certificates that can be obtained by participants in several Actions of the Programme; and b) a defined process which supports young people, youth workers and youth organisations to reflect about the learning outcomes from an Erasmus+ project in the field of youth and non-formal learning. Youthpass is also part of a broader European Commission strategy which aims to enhance the recognition of non-formal and informal learning and of youth work in Europe and beyond. |

# ANNEX IV - USEFUL REFERENCES AND CONTACT DETAILS

## USEFUL REFERENCES

| Title | Link |
|---|---|
| Europe 2020 and ET 2020 benchmarks and indicators | http://ec.europa.eu/eurostat/statistics-explained/index.php?title=Europe_2020_indicators_-_education&oldid=301033 |
| Analysis of education (covering ECEC, schools, youth and higher education as well as many specific educational domains | http://eacea.ec.europa.eu/education/eurydice/ |
| Analysis of education and training; covering all areas | http://www.oecd.org/education/ |
| Analysis of education and training; covering all areas | https://en.unesco.org/<br>http://www.uis.unesco.org/Pages/default.aspx |
| Diploma Supplement model: | http://ec.europa.eu/education/tools/diploma-supplement_en.htm |
| ECTS Users' Guide | http://ec.europa.eu/education/tools/docs/ects-guide_en.pdf |
| ECVET | http://ec.europa.eu/education/policy/vocational-policy/ecvet_en.htm<br><br>http://www.ecvet-secretariat.eu |
| Entrepreneurship Education: A Guide for Educators | http://ec.europa.eu/DocsRoom/documents/7465/attachments/1/translations/en/renditions/native&usg=AFQjCNEAZENuwg06uXIDQR_CK8zmSko5Lw&sig2=kjtnBVqQOeVNEhNWeBUSrw&cad=rja |
| European Platform for Adult Learning in Europe (EPALE) | http://ec.europa.eu/epale |
| EQAVET | http://ec.europa.eu/education/policy/vocational-policy/eqavet_en.htm |
| Erasmus+ Project Results Platform | http://ec.europa.eu/programmes/erasmus-plus/projects/ |
| ESCO | https://ec.europa.eu/esco |
| EU Skills Panorama | http://euskillspanorama.cedefop.europa.eu |
| Europass homepage | https://europass.cedefop.europa.eu/en/home |
| European Agenda for adult learning and recent policy developments | http://ec.europa.eu/education/policy/adult-learning/index_en.htm |

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| Indicators and benchmarks - Education monitor | http://ec.europa.eu/education/tools/et-monitor_en.htm |
| Indicators and benchmarks – Official documentation | http://ec.europa.eu/education/policy/strategic-framework/indicators-benchmarks_en.htm |
| Library of key documents on Sport | http://ec.europa.eu/sport/library/index_en.htm |
| Main European youth policy documents (including the renewed framework for European cooperation in the youth field) | http://ec.europa.eu/youth/library/index_en.htm |
| Main policy initiatives and outputs in education and training since the year 2000 - Developing school education policies | http://ec.europa.eu/education/policy/school/index_en.htm |
| Main policy initiatives and outputs in education and training since the year 2000- Higher Education Reform | http://ec.europa.eu/education/policy/higher-education/index_en.htm |
| Opening up Education – Innovative teaching and learning for all through new technologies and open educational resources Comm(2013)654 | http://ec.europa.eu/education/newtech/ |
| Rethinking Education - investing in skills for better socio-economic outcomes | http://eur-lex.europa.eu/legal-content/EN/ALL/;jsessionid=LLFgTfdd6mZf3Wt4YNhTjyP8vnMcg4RnTT1rQHP2bfT8dWYrdNQC!1965766013?uri=CELEX:52012DC0669<br><br>http://ec.europa.eu/education/policy/strategic-framework/index_en.htm |
| Supporting growth and jobs – an agenda for the modernisation of Europe's higher education systems | http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2011:0567:FIN:EN:PDF |
| Standardization initiative - A strategic vision for European standards: Moving forward to enhance and accelerate the sustainable growth of the European economy by 2020 | http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2011:0311:FIN:EN:PDF |
| The Bruges Communiqué on enhanced European Cooperation in Vocational Education and Training for the period 2011-2020 | http://ec.europa.eu/education/brugecomm/ |
| Towards Greater Cooperation and Coherence in Entrepreneurship Education | http://ec.europa.eu/DocsRoom/documents/9269/attachments/1/translations/en/renditions/native |
| Youth on the Move Flagship initiative | http://europa.eu/youthonthemove/index_en.htm |
| Youthpass homepage | https://www.youthpass.eu |

## CONTACT DETAILS

**European Commission - Directorate General Education & Culture (DG EAC)**
http://ec.europa.eu/erasmus-plus

**European Commission - Education, Audiovisual and Culture Executive Agency (EACEA)**
http://eacea.ec.europa.eu/index_en.php

**National Agencies**
http://ec.europa.eu/programmes/erasmus-plus/contact_en