



COMMISSION OF THE EUROPEAN COMMUNITIES

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Proposal for a

DECISION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

establishing an integrated action programme in the field of lifelong learning

(presented by the Commission)

(SEC(2004) 971)

EXPLANATORY MEMORANDUM

1. INTRODUCTION

- 1.1. In March 2004 the Commission adopted a Communication “The new generation of Community Education and Training Programmes after 2006”¹ (“the earlier Communication”), following up the February Communication on “policy challenges and budgetary means for the period 2007-2013”². It indicated the Commission’s intention to propose an integrated lifelong learning programme, incorporating the ensemble of existing internal education and training programmes. The draft Decision attached to this memorandum establishes that programme.
- 1.2. The integrated lifelong learning programme builds on the current Socrates and Leonardo da Vinci programmes, the eLearning programme, the Europass initiative, and the various actions funded through the Community action programme to promote bodies active at European level and to support specific activities in the fields of education and training. In addition, the Erasmus Mundus programme, which has just been launched and runs to 2008, should be incorporated as an additional programme within the Integrated Programme from 2009.
- 1.3. As the earlier Communication pointed out, this restructuring responds in particular to four factors:
- to changes across the EU whereby education and training systems are becoming increasingly integrated in a lifelong learning context, in order to respond to the new challenges of the knowledge society and of demographic change,
 - to the increasingly important role for education and training in creating a competitive and dynamic knowledge-based economy in Europe, and in enabling adaptability to change, most notably in the follow-up to the 2000 Lisbon European Council, in the Bologna and Copenhagen processes, and in the accompanying policy development that has taken place at European level since the current Socrates and Leonardo da Vinci programmes started,
 - to the need to reinforce the strengths and address the perceived discontinuities and lack of synergy resulting from the current more fragmented programme design, as revealed by interim evaluations of Socrates and Leonardo da Vinci, and by the public consultation on the options for the new generation of programmes, and
 - to the need to simplify and rationalise Community legislative instruments by creating an integrated framework within which a wide variety of activities can be funded.

The remainder of this memorandum describes the fundamental principles underlying the Commission’s proposal, explains the main features of the draft Decision, and sets out how the principles of subsidiarity and proportionality are respected.

¹ COM (2004) 156 final

² COM (2004) 101

2. THE WAY FORWARD

Through its education and training programmes the Union reaches out directly to its citizens – no other Community activity touches so many people so directly, every year. They also support the modernisation of the Union’s education and training systems, and motivate individuals to improve their professional practice: in short, they help the Union as a whole reach the Lisbon targets. The Commission therefore proposes the following changes to the current programmes.

2.1. An Integrated Programme for education and training

The Integrated Programme will comprise four specific programmes: **Comenius**, for general education activities concerning schools up to and including upper secondary level; **Erasmus**, for education and advanced training activities at higher education level; **Leonardo da Vinci**, for all other aspects of vocational education and training; and **Grundtvig** for adult education. In addition, the proposal incorporates a “transversal” programme incorporating four key activities, to cover the policy issues outlined above, and to make specific provision for language learning and ICT-related activity where these fall outside the specific programmes; and for a more substantial dissemination activity; and a **Jean Monnet** programme to support action related to European integration and European institutions and associations in education and training.

The integrated approach is designed on the one hand to preserve essential continuity with past experience, hence an architecture based on the main types of education and training provision found in all Member States and retention of the established programme names, and on the other to increase the coherence and synergy between all its constituent parts, so as to permit a greater and more flexible range of actions to be supported more efficiently. The Integrated Programme will therefore comprise common actions and procedures across all its parts, and a single programme committee to ensure overall coherence.

2.2. A more substantial programme

The effectiveness and added value of European cooperation programmes in the field of education and training have been repeatedly demonstrated. They provide an instrument for spreading innovation and good practice that would otherwise remain locked within national borders. The mobility action has a clear positive impact not only on the individuals involved, but also on the institutions with which they are involved. The types of European cooperation promoted by the programmes contribute to the modernisation and improvement of education and training systems throughout the Union.

In the light of the wide consensus on value of the programmes, and of the new challenges following the Lisbon targets, the Commission concludes that the new Integrated Programme for education and training should aim for a substantial increase in volume and in effectiveness compared to its predecessors.

The Commission has revised the quantified targets set out in the earlier Communication, in the light of changes to the amounts it now proposes in the detailed financial perspective 2007 to 2013. These targets are:

- 1 in 20 school pupils involved in Comenius actions 2007 – 2013;
- 3 million Erasmus students by 2011;
- 150,000 Leonardo placements by 2013;
- 25,000 Grundtvig mobilities by 2013.

The Commission views such ambitious targets as essential to make the new programme an adequate instrument to support the achievement of the most competitive and dynamic knowledge-based economy by 2010.

The budgetary envelope will need consequent expansion; the proposed indicative financial amount is set at € 13.620 billion for the 7 years of the programme.

2.3. A simpler programme

Pressure for a simpler and more flexible programme has come from the public consultation; from Member States; from the National Agencies; and from the Commission itself in its budgetary Communication. It should be noted that actions supported under the current proposal in some cases will continue up to 2013; and that projects approved in that year will not all be finished before the end of 2016. The proposed Decision therefore includes only those provisions on operational matters that it is essential to set out in legislation.

Simplification, however, requires more than good intentions: it requires that the legislative environment be appropriate; and that where it is not appropriate the necessary legislative derogations should be introduced. In specific terms, this implies focused derogations to the Implementing Rules for the Financial Regulation. The guiding principle is proportionality: the administrative and accounting requirements should be proportional to the size of the grant. This implies further consideration, in particular, of the following areas:

- A greater use of flat-rate grants and scales of unit costs.
- Enabling simpler application forms and contracts.
- Extending the co-financing through contributions in kind, and limiting the accounting obligations of beneficiaries in such cases.
- Simplified documentation on the financial and operational capacity of beneficiaries.

These simplifications are a *sine qua non* requirement if the targets set out in the decision are to be reached. The Commission will therefore present in due course appropriate derogations to the Financial Regulations, either by amendments to the Implementing Rules directly, or by amending the current proposal to incorporate targeted derogations specifically for this programme.

2.4. A more decentralised programme

The Commission proposes that more activity should be managed at national level, through the network of National Agencies. Their advantages include understanding of the national context and priority needs, and the ability to create a more user-friendly environment.

The Commission considers that it is appropriate to administer actions through National Agencies where one or more of the following conditions apply:

- An objective method of distributing budgetary resources between Member States can be established reflecting rate of occurrence of the activity.
- The actions are small-scale or addressed to individuals, so that a full selection at European level is not warranted.
- The actions address needs specific to individual Member States.

The draft decision therefore proposes that the following activities should be administered via National Agencies: mobility, small-scale partnerships between institutions, transfer of innovation projects in the field of vocational education and training, and some work on the dissemination and exploitation of results. Section 3 of the Financial Statement explains in more detail the principles underlying the choice of the management methods proposed for the programme.

3. THE DESIGN OF THE PROGRAMME PROPOSAL

3.1. Title One: General Provisions

Articles 1 and 2 set out the general and specific objectives for the Integrated Programme and for the specific programmes within it. These are complemented by operational objectives for each specific programme, set out in each chapter of Title Two.

Article 5 sets out the generic actions that can be found across the Integrated Programme. This is a measure designed to maximise simplification and flexibility. The annex sets out which actions will be managed by the Commission and which by the National Agencies.

Article 6 sets out the tasks of the Commission and of the Member States, notably in relation to the establishment and operation of the National Agencies in the light of the requirements of the Financial Regulation.

Article 7 permits participation in the programme to be extended to Switzerland and the countries of the Western Balkans.

Article 10 establishes a committee for the Integrated Programme, which will meet in different formations according to the subject matter at hand. The Commission envisages that five separate formations will be needed: one to cover the Integrated Programme as a whole, the transversal programme and the Jean Monnet Programme; and four others to cover Comenius, Erasmus, Leonardo da Vinci and Grundtvig.

Article 9 provides that, in accordance with the proposed comitology Decision, the committee's role in the selection process should focus on the process, criteria and budget, but not on the selection of individual projects.

Article 15 provides for a funding envelope of € 13.620 billion. The detail is found in Section B.8 of the Annex. The minimum figures set out there can be varied by the Commission in agreement with the Committee acting in management procedure. This article also allows for a maximum of 1% to be spent on supporting the participation of partners from non-participating third countries in partnership, project and network activities under the programme.

3.2. Title Two, Chapters One to Four: the Comenius, Erasmus, Leonardo da Vinci and Grundtvig programmes

The four sectoral programmes, Comenius, Erasmus, Leonardo da Vinci and Grundtvig, are all constructed in the same way.

The distribution of activities between the four sectoral programmes differs somewhat from the current programmes; the most important change is that advanced vocational education transfers from Leonardo to Erasmus.

For each sectoral programme, the Decision specifies which of the generic actions defined in Article 5 will be available, and sets out examples of the main forms such actions will take in the context of the specific programmes. Only the essential detail is included in the legislative text, and the ways of implementing the generic actions in each programme described in the Decision are not exclusive, permitting other types to be developed in consultation with the Committee should the need arise.

All actions provide scope for language and new technology elements to be "mainstreamed". The Comenius actions include the school twinning activity hitherto supported under the eLearning programme. The Erasmus actions, reflecting the incorporation of advanced vocational training, include higher education student placements in enterprises (formerly in Leonardo da Vinci) and envisage specific mobility arrangements for students on Joint Masters programmes.

In Leonardo da Vinci, the projects action has been reconceived in the light of the results of the interim evaluation. Projects will largely be managed via the National Agencies and they will mostly focus upon the transfer of innovation into one country from others. A new partnerships action will consist of small-scale projects enabling training organisations to co-operate on themes of mutual interest. The networks action, which supports reflection at European level on key issues in the field of vocational training, has been significantly reinforced.

Under Grundtvig, new mobility actions are proposed to support the mobility of adult learners, staff exchanges, European assistantships in addition to adult educators (the current Grundtvig action of Socrates was limited almost exclusively to the latter).

3.3. Title Two, Chapter Five: The Transversal Programme

The transversal programme constitutes one of the major innovations in the Integrated Programme. It provides the Community with a more effective instrument for pursuing activity that cuts across two or more "traditional" fields of activity, notably across the sectoral programmes.

The transversal programme is divided into four Key Activities.

Key Activity 1 is largely a new activity in the current programme proposal focused on policy development. It incorporates a number existing actions such as Arion, Cedefop visits, the Eurydice network, etc, and focuses them more effectively on policy issues of general significance to the Community. It adds new projects, networks and observation and analysis actions, to create new mechanism to help the Union realise the demands made of it in policy terms.

Key Activity 2 complements "mainstream" language action in the sectoral programmes. Transversal action is needed such as multilateral projects to develop language-learning materials and testing tools, networks of key actors, multilingual web portals; and awareness-raising campaigns.

Key Activity 3 focuses on experimentation with the generalisation of innovative approaches to teaching and learning (e-learning) with respect to new pedagogy, services, technology and content.

Key Activity 4 is a new activity aiming at the exploitation and transfer of good project results into educational and vocational training systems at Community, national, regional and sectoral levels. Projects may be managed by the Commission or through the National Agencies.

3.4. Title Two, Chapter Six: the Jean Monnet programme

The Jean Monnet Programme targets the academic field of European integration and the support needed for institutions and associations active in education and training at European level.

The list of institutions which the Commission proposes to support directly under this programme is limited to four, which are included in the existing Community action programme to promote bodies active at European level and to support specific activities in the fields of education and training. Operating grants may be awarded to these four institutions, on condition that all the requirements of the Financial Regulation are fulfilled. As specified in articles 2(3)(c) and 42(3) of this proposal, the designation of these four beneficiaries is without prejudice to the support for other institutions, such as recognised centres of excellence at European level, which may also be awarded operating grants under this action, in response to a call for proposals. Such institutions may also participate in other relevant parts of the Integrated Programme and the Erasmus Mundus programme, provided they fulfil all the conditions which apply to these actions, including the selection procedure. Through these calls for proposals the Commission aims inter alia to support the development of key institutions and associations active at European level, including

those with similar features to the four designated beneficiaries, in order to underpin a network of centres of European excellence within the Union.

3.5. Financial and administrative annex

Points A and B1 of the annex focus on the distinction between National Agency procedure actions (those managed by the National Agencies) and Commission procedure actions (those managed directly by the Commission or on its behalf by an Executive Agency, to which it may decide to entrust part of the tasks of managing the programme, in conformity with Article 54 of the Financial Regulation³).

The Decision envisages two types of National Agency procedures. The first, currently applied to all decentralised actions within Socrates and to the mobility actions of Leonardo da Vinci, will continue to be the most widespread. It provides for National Agencies to select beneficiaries and to allocate grants to institutions based exclusively in their respective countries for the exclusive use of those institutions. The second type, designed to replace the current “Procedure B” under Leonardo da Vinci, allows for National Agencies to select entire transnational or multilateral projects and to fund the participation of all partners concerned through the coordinator, subject to a favourable decision from the Commission on the short list of projects submitted by the Agency.

Points B2 to B11 of the annex concern detailed financial provisions, technical assistance, and anti-fraud measures.

4. SUBSIDIARITY AND PROPORTIONALITY

As far as subsidiarity is concerned, the new programme continues, as with the past generations of Community action, to focus on promoting and optimising cooperation between Member States in all the fields of lifelong learning. It does not attempt to intervene in the structure and content of education and training systems, but focuses on areas where European added value can be engendered.

As far as proportionality is concerned, the proposal is designed to achieve the maximum simplification not only in the form of its actions but in its administrative and financial requirements, consistent with appropriate financial and procedural safeguards.

³ Council Regulation (EC, Euratom) No 1605/2002 (OJ L 248, 16.9.2002, p.1).

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THE EUROPEAN PARLIAMENT AND THE COUNCIL OF THE EUROPEAN UNION,

Having regard to the Treaty establishing the European Community, and in particular Articles 149(4) and 150(4) thereof,

Having regard to the proposal from the Commission⁴,

Having regard to the opinion of the European Economic and Social Committee⁵,

Having regard to the opinion of the Committee of the Regions⁶,

Acting in accordance with the procedure laid down in Article 251 of the Treaty⁷,

Whereas:

- (1) Council Decision 382/1999/EC⁸ established the second phase of the Community vocational training action programme ‘Leonardo da Vinci’.
- (2) Decision 253/2000/EC of the European Parliament and of the Council⁹ established the second phase of the Community action programme in the field of education ‘Socrates’.
- (3) Decision 2318/2003/EC of the European Parliament and of the Council¹⁰ established a multi-annual programme for the effective integration of Information and Communication Technologies (ICT) in education and training systems in Europe (eLearning programme).
- (4) Decision 791/2004/EC of the European Parliament and of the Council¹¹ established a Community action programme to promote bodies active at European level in the field of education and training and to support specific activities in this field.

⁴ OJ C , , p. .

⁵ OJ C , , p. .

⁶ OJ C , , p. .

⁷ OJ C , , p. .

⁸ OJ L 146, 11.6.1999, p.33. Decision as last amended by Regulation (EC) No. 1882/2003 of the European Parliament and of the Council (OJ L 284, 31.10.2003, p.1).

⁹ OJ L 28, 3.2.2000, p.1. Decision as last amended by Decision 786/2004/EC (OJ L 138, 30.4.2004, p.7).

¹⁰ OJ L 345, 31.12.2003, p.9.

¹¹ OJ L 138, 30.4.2004, p.31.

- (5) Decision xxx/2004/EC of the European Parliament and of the Council¹² established a single framework for the transparency of qualifications and competences (Europass).
- (6) The Bologna Declaration, signed by the Ministers for Education of 29 European countries on 19 June 1999, established an intergovernmental process aimed at creating a ‘European Area of Higher Education’ by 2010, which requires support at Community level.
- (7) The special meeting of the European Council in Lisbon on 23-24 March 2000 set a strategic goal for the European Union to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion, and invited the Education Council to undertake a general reflection on the concrete future objectives of education systems, focusing on common concerns and priorities while respecting national diversity.
- (8) On 12 February 2001 the Council adopted a report on the concrete future objectives of education and training systems. On 14 June 2002 it subsequently adopted a detailed work programme on the follow-up of these objectives, requiring support at Community level.
- (9) The meeting of the European Council in Göteborg on 15-16 June 2001 agreed a strategy for sustainable development and added an environmental dimension to the Lisbon process for employment, economic reform and social cohesion.
- (10) The meeting of the European Council in Barcelona on 15-16 March 2002 set the objective of making European Union education and training systems a world quality reference by 2010, and called for action to improve the mastery of basic skills, in particular by teaching at least two foreign languages from a very early age.
- (11) The Commission Communication¹³ and the Council Resolution¹⁴ on lifelong learning affirm that lifelong learning should be enhanced by actions and policies developed within the framework of Community programmes in this field.
- (12) The Council Resolution of 19 December 2002 on the promotion of enhanced European cooperation in vocational education and training¹⁵ established a process of enhanced European cooperation in vocational education and training, requiring support at Community level. The Copenhagen Declaration, agreed by the Ministers for Education of 31 European countries on 30 November 2002, associated the social partners and the candidate countries to this process.
- (13) The Communication from the Commission on the Action Plan for skills and mobility¹⁶ noted the continuing need for action at European level to improve the recognition of education and training qualifications.

¹² OJ

¹³ COM (2001) 678 final.

¹⁴ OJ C 163, 09.07.2002, p.1.

¹⁵ OJ C 13, 18.1.2003, p.2.

¹⁶ COM (2002) 72.

- (14) The Communication from the Commission on the Action Plan promoting language learning and linguistic diversity¹⁷ set out actions to be taken at European level during the period 2004-2006 and requires follow-up action.
- (15) The interim evaluation reports of the existing Socrates and Leonardo da Vinci programmes and the public consultation on the future of Community activity in education and training revealed a strong and in some respects growing need for continuing cooperation and mobility in these fields at European level. They emphasised the importance of creating closer links between Community programmes and policy developments in education and training, expressed the wish that Community action should be structured so as to respond better to the lifelong learning paradigm, and pressed for a simpler, more user-friendly and more flexible approach to implementing such action.
- (16) Significant advantages would accrue from integrating Community support for trans-national cooperation and mobility in the fields of education and training into a single programme, which would permit greater synergies between the different fields of action, and offer more capacity to support developments in lifelong learning, and more coherent, streamlined and efficient modes of administration.
- (17) An Integrated Programme should therefore be established to contribute through lifelong learning to the development of the European Union as an advanced knowledge society, with sustainable economic development, more and better jobs and greater social cohesion.
- (18) Given the specificities of the schools, higher education, vocational training and adult education sectors, and the consequent need for Community action to be based on objectives, forms of action and organisational structures tailored to them, it is appropriate to retain individual programmes within the framework of the Integrated Programme targeted at each of these four sectors, while maximising the coherence and commonality between them.
- (19) In its Communication “Building our common Future: Policy challenges and Budgetary means of the Enlarged Union 2007-2013”¹⁸, the Commission set out a sequence of quantified targets to be achieved by the new generation of Community education and training programmes, which require a significant increase in mobility and partnership actions.
- (20) Given the demonstrated beneficial impacts of trans-national mobility on individuals and on education and training systems, the high volume of unfulfilled demand for mobility in all sectors, and its importance in the context of the Lisbon target, it is necessary to increase substantially the volume of support for trans-national mobility in the four sectoral programmes.
- (21) In order to respond to the increased need to support activities at European level designed to achieve these policy objectives, to provide a means of supporting trans-sectoral activity in the fields of languages and ICT, and to strengthen the

¹⁷ COM (2003) 449 final.

¹⁸ COM (2004) 101, pp13-14.

dissemination and exploitation of results of the programme, it is appropriate to complement the four sectoral programmes with a transversal programme.

- (22) In order to respond to the increasing need for knowledge and dialogue on the European integration process and its development, it is important to stimulate excellence in teaching, research and reflection in this field by supporting higher education institutions specialising in the study of the European integration process, European associations in the fields of education and training and the Jean Monnet Action.
- (23) It is necessary to provide sufficient flexibility in the formulation of this Decision to allow for appropriate adjustments in the actions of the Integrated Programme to respond to changing needs during the period 2007 to 2013, and to avoid the inappropriately detailed provisions of previous phases of Socrates and Leonardo da Vinci.
- (24) In all its activities, the Community must eliminate inequalities, and promote equality, between men and women, as provided for in Article 3 of the Treaty.
- (25) Further to Article 151 of the Treaty, the Community must take cultural aspects into account in its action under other provisions of the Treaty, in particular in order to respect and to promote the diversity of its cultures.
- (26) There is a need to promote active citizenship and to step up the fight against exclusion in all its forms, including racism and xenophobia.
- (27) The special learning needs of people with disabilities should be actively addressed.
- (28) The candidate countries for membership of the European Union and the EFTA countries which are members of the EEA may participate in Community programmes in accordance with agreements to be signed between the Community and these countries.
- (29) The European Council in Thessaloniki on 19 and 20 June 2003 approved the Council conclusions of 16 June on the Western Balkans, including its annex "The Thessaloniki Agenda for the Western Balkans: moving towards European integration", which provides that Community programmes should be opened to the Stabilisation and Association Process countries on the basis of framework agreements to be signed between the Community and those countries.
- (30) The Community and the Swiss Confederation have declared their intention of undertaking negotiations to conclude agreements in areas of common interest such as Community education, training and youth programmes.
- (31) The Integrated Programme should be regularly monitored and evaluated in cooperation between the Commission and the Member States in order to allow for readjustments, particularly with respect to the priorities for implementing the measures. The evaluation should include an external evaluation to be conducted by independent, impartial bodies.

- (32) Resolution 2000/2315(INI) of the European Parliament on the implementation of the Socrates programme¹⁹ drew attention to the disproportionately onerous administrative procedures for grant applicants under the second phase of the programme.
- (33) Council Regulation (EC, Euratom) No 1605/2002 of 25 June 2002 on the Financial Regulation applicable to the general budget of the European Communities²⁰ and Commission Regulation (EC, Euratom) No 2342/2002 of 23 December 2002 laying down detailed rules for the implementation of Council Regulation 1605/2002²¹, which safeguard the Community's financial interests, have to be applied taking into account the principles of simplicity and consistency in the choice of budgetary instruments, a limitation on the number of cases where the Commission retains direct responsibility for their implementation and management, and the required proportionality between the amount of resources and the administrative burden related to their use.
- (34) Appropriate measures should also be taken to prevent irregularities and fraud and the necessary steps should be taken to recover funds lost, wrongly paid or incorrectly used.
- (35) Since the objectives of the proposed action concerning the contribution of European cooperation to quality education and training cannot be sufficiently achieved by the Member States because of the need for multilateral partnerships, trans-national mobility and Community-wide exchanges of information, and can therefore, by reason of the nature of the actions and measures necessary, be better achieved at Community level, the Community may adopt measures, in accordance with the principle of subsidiarity as set out in Article 5 of the Treaty. In accordance with the principle of proportionality, as set out in that Article, this Decision does not go beyond what is necessary in order to achieve those objectives.
- (36) This Decision establishes a financial framework for the entire duration of the programme, which is to be the principal point of reference for the budgetary authority within the meaning of point 33 of the interinstitutional agreement of 6 May 1999 between the European Parliament, the Council and the Commission on budgetary discipline and improvement of the budgetary procedure²².
- (37) The measures necessary for the implementation of this Decision should be adopted in accordance with Council Decision 1999/468/EC of 28 June 1999 laying down the procedures for the exercise of implementing powers conferred on the Commission²³

¹⁹ OJ C 293 E, 28.02.2002, p.103.

²⁰ OJ L 248, 16.9.2002, p.1.

²¹ OJ L 357, 31.12.2002, p.1.

²² OJ C 172, 18.06.1999, p1

²³ OJ L 184, 17.7.1999, p.23.

HAVE DECIDED AS FOLLOWS:

TITLE I

GENERAL PROVISIONS

Chapter I

The Integrated Programme

Article 1

Establishment of the Integrated Programme

1. This Decision establishes an integrated programme for Community action in the field of lifelong learning, hereinafter referred to as ‘the Integrated Programme’.
2. The general objective of the Integrated Programme is to contribute through lifelong learning to the development of the Community as an advanced knowledge society, with sustainable economic development, more and better jobs and greater social cohesion, while ensuring good protection of the environment for future generations. In particular, it aims to foster interchange, cooperation and mobility between education and training systems within the Community so that they become a world quality reference.
3. The Integrated Programme shall have the following specific objectives:
 - (a) to contribute to the development of quality lifelong learning and to promote innovation and a European dimension in systems and practices in the field;
 - (b) to help improve the quality, attractiveness and accessibility of the opportunities for lifelong learning available within Member States;
 - (c) to reinforce the contribution of lifelong learning to personal fulfilment, social cohesion, active citizenship, gender equality and the participation of people with special needs;
 - (d) to help promote creativity, competitiveness, employability and the growth of an entrepreneurial spirit;
 - (e) to contribute to increased participation in lifelong learning by people of all ages;
 - (f) to promote language learning and linguistic diversity;
 - (g) to reinforce the role of lifelong learning in creating a sense of European citizenship and encouraging tolerance and respect for other peoples and cultures;

- (h) to promote co-operation in quality assurance in all sectors of education and training in Europe;
 - (i) to exploit results, innovative products and processes and to exchange good practice in the fields covered by the Integrated Programme.
4. In accordance with the administrative provisions set out in the Annex, the Integrated Programme shall support and supplement action taken by the Member States.
 5. As set out in Article 2, the objectives of the Integrated Programme shall be pursued through the implementation of four sectoral programmes, one transversal programme, and the Jean Monnet programme, hereinafter collectively referred to as 'the Specific Programmes'.
 6. This Decision shall be implemented over the period from 1 January 2007 until 31 December 2013. However, preparatory measures, including decisions by the Commission in accordance with Article 9, may be implemented as from the entry into force of this Decision.
 7. The provisions of this Decision relating to the Integrated Programme shall also govern the Specific Programmes, to which specific provisions shall also apply.

Article 2

Specific Programmes

1. The sectoral programmes shall be the following:
 - (a) the Comenius programme, which shall address the teaching and learning needs of all those in pre-school and school education up to the level of the end of upper secondary education, and the institutions and organisations providing such education;
 - (b) the Erasmus programme, which shall address the teaching and learning needs of all those in formal higher education and vocational education and training at tertiary level, whatever the length of their course or qualification may be and including doctoral studies, and the institutions and organisations providing such education and training;
 - (c) the Leonardo da Vinci programme, which shall address the teaching and learning needs of all those in vocational education and training including initial and continuing vocational training, other than advanced vocational education and training at tertiary level, as well as the institutions and organisations providing or facilitating such education and training;
 - (d) the Grundtvig programme, which shall address the teaching and learning needs of those in all forms of adult education, as well as the institutions and organisations providing or facilitating such education.
2. The transversal programme shall comprise the following four key activities:

- (a) policy cooperation in lifelong learning within the Community;
 - (b) promotion of language learning;
 - (c) development of innovative ICT-based content, services, pedagogies and practice for lifelong learning;
 - (d) dissemination and exploitation of results of actions supported under the programme and previous related programmes, and exchange of good practice.
3. The Jean Monnet programme shall support institutions and activities in the field of European integration. It shall comprise the following three key activities:
- (a) the Jean Monnet Action;
 - (b) operating grants to support specified institutions dealing with issues relating to European integration;
 - (c) operating grants to support other European institutions and associations in the fields of education and training
4. In addition to the objectives set out in Article 1, the Specific Programmes shall have the following specific objectives:
- (a) the Comenius programme:
 - (i) to develop understanding among young people and educational staff of the diversity of European cultures and its value;
 - (ii) to help young people acquire the basic life-skills and competences necessary for their personal development, for future employment and for active European citizenship;
 - (b) the Erasmus programme:
 - (i) to support the realisation of a European Higher Education Area;
 - (ii) to reinforce the contribution of higher education and advanced vocational education to the process of innovation;
 - (c) the Leonardo da Vinci programme: to facilitate adaptation to labour market changes and to the evolution of skills needs;
 - (d) the Grundtvig programme:
 - (i) to respond to the educational challenge of an ageing population in Europe;
 - (ii) to help provide adults with alternative pathways to improving their knowledge and competences;
 - (e) the transversal programme:

- (i) to promote European cooperation in fields covering two or more sectoral programmes;
 - (ii) to promote the convergence of Member States' education and training systems;
- (f) the Jean Monnet programme:
- (i) to stimulate teaching, research and reflection activities in the field of European integration studies;
 - (ii) to support the existence of an appropriate range of institutions and associations focusing on issues relating to European integration and on education and training in a European perspective.

Article 3

Definitions

For the purpose of this Decision, the following definitions shall apply:

1. "pre-school" means organised educational activity undertaken before the start of obligatory primary schooling;
2. "pupil" means a person enrolled in a learning capacity at a school;
3. "school" means all types of institutions providing general (nursery or other pre-school, primary or secondary), vocational and technical education and, exceptionally, in the case of measures to promote language learning, non-school institutions providing apprenticeship training;
4. "teachers/educational staff" means persons who, through their duties, are involved directly in the educational process in the Member States;
5. "student" means a person registered in a higher education institution, whatever their field of study, in order to follow higher education studies leading to a degree or diploma, up to and including the level of doctorate;
6. "higher education institution" means:
 - (a) any type of higher education institution, according to national legislation or practice, which offers qualifications or diplomas at that level, whatever such establishments may be called in the Member States;
 - (b) any institution providing advanced vocational training at International Standard Classification of Education (ISCED) levels 5 or 6;
7. "Joint Masters" means Masters courses in higher education that:
 - (a) involve a minimum of three higher education institutions from three different Member States;

- (b) implement a study programme which involves a period of study in at least two of those three institutions;
 - (c) have built-in mechanisms for the recognition of periods of study undertaken in partner institutions based on, or compatible with, the European credit transfer system;
 - (d) result in the awarding of joint, double or multiple degrees, recognised or accredited by the Member States, from the participating institutions;
8. “initial vocational training” means any form of initial vocational training, including technical and vocational teaching, apprenticeship and vocationally oriented education, which contributes to the achievement of a vocational qualification recognised by the competent authorities in the Member State in which it is obtained;
 9. “continuing vocational training” means any vocational training undertaken by a person in the Community during his or her working life;
 10. “adult education” means all forms of non-vocational adult learning, whether of a formal, non-formal or informal nature;
 11. “study visit” means a short-term visit, made to study a particular aspect of lifelong learning in another Member State, to exchange good practice or to learn a new methodology or skill;
 12. “mobility” means moving physically to another country, in order to undertake study, work experience, other learning or teaching activity or related administrative activity, supported as appropriate by preparation in the host language;
 13. “placement” means a stay in an enterprise or organisation in another Member State, supported as appropriate by preparation in the host language, with a view to acquiring a specific skill or to improving understanding of the economic and social culture of the country concerned;
 14. “unilateral” means involving a single institution;
 15. “bilateral” means involving partners from two Member States;
 16. “multilateral” means involving partners from at least three Member States. The Commission may regard associations or other bodies with membership from three Member States or more as multilateral;
 17. “partnership” means a bilateral or multilateral agreement between a group of institutions or organisations in different Member States to carry out joint European activities in lifelong learning;
 18. “network” means a formal or informal grouping of bodies active in a particular field, discipline or sector of lifelong learning;
 19. “project” means a cooperation activity developed jointly by a formal or informal grouping of organisations or institutions;

20. “project coordinator” means the organisation or institution in charge of the implementation of the project by the multilateral grouping which signs the grant agreement with the Commission;
21. “project partners” means the organisations or institutions other than the coordinator, which form the multilateral grouping;
22. “enterprise” means all undertakings in the public or private sector whatever their size, legal status or the economic sector in which they operate, and all types of economic activities, including the social economy;
23. “social partners” means, at national level, employers’ and workers’ organisations in conformity with national laws and/or practices and, at Community level, employers’ and workers’ organisations taking part in the social dialogue at Community level;
24. “learning provider” means all institutions or organisations providing lifelong learning within the context of the Integrated Programme, or within the limits of its Specific Programmes;
25. “guidance and counselling” means a range of activities such as information, assessment, orientation and advice to assist learners to make choices relating to education and training programmes or employment opportunities;
26. “dissemination and exploitation of results” means activities designed to ensure that the results of the Integrated Programme and its predecessors are appropriately recognised, demonstrated and implemented on a wide scale;
27. “lifelong learning” means all general education, vocational education and training, non-formal education and informal learning undertaken throughout life, resulting in an improvement in knowledge, skills and competences within a personal, civic, social and/or employment-related perspective. It includes the provision of counselling and guidance services.

Article 4

Access to the Integrated Programme

The Integrated Programme is aimed in particular at:

- (a) pupils, students, trainees and adult learners;
- (b) staff involved in any aspect of lifelong learning;
- (c) people in the labour market;
- (d) learning providers;
- (e) the persons and bodies responsible for systems and policies concerning any aspect of lifelong learning at local, regional and national level;

- (f) enterprises, social partners and their organisations at all levels, including trade organisations and chambers of commerce and industry;
- (g) bodies providing guidance, counselling and information services relating to any aspect of lifelong learning;
- (h) associations working in the field of lifelong learning, including students', trainees', pupils', teachers', parents' and adult learners' associations;
- (i) research centres and bodies concerned with lifelong learning issues;
- (j) non profit organisations, voluntary bodies, non-governmental organisations ("NGOs").

Article 5

Community actions

1. The Integrated Programme shall comprise support for the following actions:
 - (a) the mobility of people in lifelong learning in Europe;
 - (b) bilateral and multilateral partnerships;
 - (c) multilateral projects designed to improve national education and training systems;
 - (d) unilateral and national projects;
 - (e) multilateral projects and networks;
 - (f) observation and analysis of policies and systems in the field of lifelong learning, the establishment of reference material, including surveys, statistics, analyses and indicators, action to support transparency and recognition of qualifications and prior learning, and action to support cooperation in quality assurance;
 - (g) operating grants to support certain operational and administrative costs of organisations active in the field covered by the Integrated Programme;
 - (h) other initiatives in line with the objectives of the Integrated Programme ('Accompanying Measures').
2. Community support may be awarded for preparatory visits in respect of any of the actions set out in this Article.
3. The Commission may organise such seminars, colloquia or meetings as are likely to facilitate the implementation of the Integrated Programme, and undertake appropriate information, publication and dissemination actions as well as programme monitoring and evaluation.

4. The actions referred to in this Article may be implemented by means of calls for proposals, calls for tenders, or directly by the Commission.

Article 6

Tasks of the Commission and the Member States

1. The Commission shall ensure the implementation of the Community actions provided for by the Integrated Programme.
2. The Member States shall
 - (a) take the necessary steps to ensure the efficient running of the Integrated Programme at Member State level, involving all the parties concerned with all aspects of lifelong learning in accordance with national practice;
 - (b) establish or designate and monitor an appropriate structure for the coordinated management of the implementation of the Integrated Programme's actions at Member State level (national agencies), including budgetary management, in conformity with the provisions of Article 54(2)(c) of Council Regulation (EC, Euratom) No 1605/2002²⁴ and of Article 38 of Commission Regulation (EC, Euratom) No 2342/2002²⁵, in accordance with the following criteria:
 - (i) an organisation established or designated as a national agency shall have legal personality, and be governed by the law of the Member State concerned. A ministry may not be designated as a national agency;
 - (ii) national agencies must have an adequate number of staff, with professional and linguistic capacities appropriate for work in an environment of international cooperation in the field of education and training;
 - (iii) they must have an appropriate infrastructure, in particular as regards informatics and communications;
 - (iv) they must operate in an administrative context which enables them to carry out their tasks satisfactorily and to avoid conflicts of interest;
 - (v) they must be in a position to apply the financial management rules and contractual conditions laid down at Community level;
 - (vi) they must offer adequate financial guarantees, issued preferably by a public authority, and their management capacity must be appropriate to the level of Community funds they will be called upon to manage;
 - (c) take responsibility for the proper management by the national agencies referred to in sub-paragraph (b) above of credits transferred to national agencies to

²⁴ OJ L 248, 16.9.2002 p.1.

²⁵ OJ L 357, 31.12.2002, p.1.

support projects, and in particular for the respect by national agencies of the principles of transparency, equality of treatment and of the avoidance of double-funding with other sources of Community funds, and of the obligation to monitor projects and to recover any funds due for reimbursement by beneficiaries;

- (d) take the necessary steps to ensure the appropriate audit and financial oversight of the national agencies referred to under sub-paragraph (b) above, and in particular:
 - (i) before the national agency starts work, provide the Commission with the necessary assurances as to the existence, relevance and proper operation within it, in accordance with the rules of sound financial management, of the procedures applied, the control systems, the accounting systems and the procurement and grant award procedures;
 - (ii) provide the Commission with a declaration of assurance each year as to the reliability of the financial systems and procedures of the national agencies, and the probity of their accounts;
- (e) in the event of irregularity, negligence or fraud imputable to a national structure established or designated under sub-paragraph (b) above, and where this gives rise to claims by the Commission on the national agency which are not completely recovered, be responsible for the funds not recovered;
- (f) designate upon request from the Commission the learning providers or the types of learning providers to be considered eligible to participate in the Integrated Programme in their respective territories;
- (g) adopt all appropriate measures to remove legal and administrative obstacles to the proper functioning of the Integrated Programme;
- (h) take steps to ensure that potential synergies with other Community programmes and financial instruments and with other relevant programmes operating in the Member State in question are realised at Member State level.

3. The Commission, in cooperation with the Member States, shall ensure

- (a) the transition between the actions carried out within the context of the preceding programmes in the fields of education, training and lifelong learning and those to be implemented under the Integrated Programme;
- (b) the adequate protection of the Communities' financial interests, in particular by introducing effective, proportionate and dissuasive measures, administrative checks and penalties;
- (c) appropriate information, publicity and follow-up with regard to actions supported under the Integrated Programme.

Article 7

Participation of third countries

1. The Integrated Programme shall be open to the participation of:
 - (a) EFTA countries which are members of the EEA, in accordance with the conditions laid down in the EEA Agreement;
 - (b) Turkey and the candidate countries of Central and Eastern Europe benefiting from a pre-accession strategy, in accordance with the general principles and general terms and conditions for the participation of these countries in Community programmes established in the respective Framework Agreement and Association Council Decisions;
 - (c) the countries of the Western Balkans, in accordance with the provisions to be determined with these countries following the establishment of framework agreements concerning their participation in Community programmes;
 - (d) the Swiss Confederation, on the basis of a bilateral agreement to be concluded with this country.
2. Key activity 1 of the Jean Monnet programme referred to in Article 2(3)(a) shall also be open to higher education institutions in any other third country.
3. Third countries participating in the Integrated Programme shall be subject to all the obligations and will fulfil all the tasks set out in this Decision in relation to Member States.

Article 8

International cooperation

Under the Integrated Programme, and in accordance with Article 9, the Commission may cooperate with third countries and with the competent international organisations, in particular the Council of Europe, the Organisation for Economic Co-operation and Development (OECD) and the United Nations Educational, Scientific and Cultural Organisation (UNESCO).

Chapter II

Implementation of the Integrated Programme

Article 9

Implementing measures

1. The measures necessary for the implementation of the Integrated Programme relating to the following matters shall be adopted by the Commission, in accordance with the management procedure referred to in Article 10(2):
 - (a) the annual plan of work;
 - (b) the annual budget and the distribution of funds between the Specific Programmes;
 - (c) the arrangements for ensuring internal consistency within the Integrated Programme;
 - (d) the arrangements for monitoring and evaluating the Integrated Programme and for the dissemination and transfer of results;
2. The measures necessary for the implementation of all matters within Title I other than those specified in paragraph 1 of this Article shall be adopted in accordance with the advisory procedure referred to in Article 10(3).

Article 10

Committee

1. The Commission shall be assisted by a Committee, hereinafter referred to as “the Committee”.
2. Where reference is made to this paragraph, Articles 4 and 7 of Decision 1999/468/EC shall apply, having regard to the provisions of Article 8 thereof.

The period laid down in Article 4(3) of Decision 1999/468/EC shall be set at two months.
3. Where reference is made to this paragraph, Articles 3 and 7 of Decision 1999/468/EC shall apply, having regard to the provisions of Article 8 thereof.
4. The Committee shall adopt its rules of procedure.
5. Member States may not be represented by persons employed in, or having operational responsibility for, national agencies referred to in Article 6(2)(b).

Article 11

Social partners

1. Whenever the Committee is consulted on any matter concerning the application of this Decision in relation to vocational education and training, representatives of the social partners, appointed by the Commission on the basis of proposals from the European social partners, may participate in the work of the Committee as observers. The number of such observers shall be equal to the number of representatives of the Member States.
2. Such observers shall have the right to request that their position be recorded in the minutes of the meeting of the Committee.

Article 12

Horizontal issues

In implementing the Integrated Programme, due regard shall be paid to ensuring that it contributes fully to furthering the horizontal policies of the Community, in particular by:

- (a) promoting an awareness of the importance of cultural diversity and multiculturalism within Europe, as well as of the need to combat racism and xenophobia;
- (b) making provision for learners with special needs, and in particular by helping to promote their integration into mainstream education and training;
- (c) promoting an awareness of the importance of contributing to sustainable economic development;
- (d) promoting equality between men and women and contributing to combating all forms of discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation.

Article 13

Joint Actions

As part of the process of building up a Europe of knowledge, the actions supported under the Integrated Programme may be implemented in accordance with the procedures referred to in Article 10(2) jointly with related Community programmes and actions, particularly those in the field of culture, the media, youth, research and development, employment, enterprise, environment and information and communication technologies.

Article 14

Consistency and complementarity

1. The Commission shall, in cooperation with the Member States, ensure overall consistency and complementarity with other relevant Community policies, instruments and actions, in particular with the European Social Fund, with the human resource and mobility actions of the Community's Framework Programme in research and development, and with the Community's statistical programme. The Commission shall ensure an efficient link-up between the Integrated Programme and the programmes and actions in the area of education and training undertaken within the framework of the Community's pre-accession instruments, other cooperation with third countries and the competent international organisations.
2. The Commission shall keep the Committee regularly informed about other relevant Community initiatives taken in the field of lifelong learning, including cooperation with third countries and international organisations.
3. In implementing actions under the Integrated Programme, the Commission and the Member States shall have regard to the priorities set out in the employment guidelines adopted by the Council, as part of a coordinated employment strategy.
4. In partnership with the European social partners, the Commission shall endeavour to develop an appropriate coordination between the Integrated Programme and the social dialogue at Community level, including at sectoral levels.
5. In implementing the Integrated Programme, the Commission shall secure the assistance as appropriate of the European Centre for the Development of Vocational Training (Cedefop) in areas related to its competence and in accordance with the arrangements set out in Regulation (EEC) No 337/75 of the Council²⁶. Where appropriate, the Commission may also secure the support of the European Training Foundation within the scope of its mandate and in accordance with the arrangements set out in Council Regulation (EEC) No 1360/90²⁷.
6. The Commission shall keep the Advisory Committee on Vocational Training regularly informed of relevant progress under the Leonardo da Vinci Programme.

²⁶ OJ L 39, 13.2.1975.

²⁷ OJ L 131, 23.5.1990, p.1.

Chapter III

Financial provisions - Evaluation

Article 15

Funding

1. The financial framework for the implementation of the Integrated Programme is hereby set at EUR 13,620 million. Of this sum, the amounts to be committed to the Comenius, Erasmus, Leonardo da Vinci and Grundtvig programmes shall not be less than as set out in point B.8 of the Annex. Those amounts may be amended by the Commission in accordance with the procedures referred to in Article 10(2).
2. Up to 1% of the budget of the Integrated Programme may be used to support the participation in partnership, project and network actions organised under the Integrated Programme of partners from third countries which do not participate in the Integrated Programme under the provisions of Article 7.
3. The annual appropriations shall be authorised by the budgetary authority within the limits of the financial perspective.

Article 16

Monitoring and evaluation

1. The Commission shall regularly monitor the Integrated Programme in cooperation with the Member States. This monitoring shall include the reports referred to in paragraph 4 and specific activities.
2. The Commission shall arrange for regular independent external evaluations of the Integrated Programme.
3. Member States shall submit to the Commission by 30 June 2010 and 30 June 2015, respectively, reports on the implementation and the impact of the Integrated Programme.
4. The Commission shall submit to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions:
 - (a) an interim evaluation report on the results achieved and on the qualitative and quantitative aspects of the implementation of the Integrated Programme by 31 March 2011,
 - (b) a communication on the continuation of the Integrated Programme by 31 December 2011,
 - (c) an ex post evaluation report by 31 March 2016.

TITLE II

THE SPECIFIC PROGRAMMES

Chapter I

The Comenius programme

Article 17

Access to the Comenius programme

Within the framework of the Integrated Programme, the Comenius programme is aimed at:

- (a) pupils in pre-school and school education up to the end of upper secondary education;
- (b) schools, as specified by Member States;
- (c) teaching, support and administrative staff within those schools;
- (d) associations and representatives of those involved in school education;
- (e) public and private organisations responsible for the organisation and delivery of education at local, regional and national levels;
- (f) research centres and bodies concerned with lifelong learning issues;
- (g) higher education institutions.

Article 18

Operational objectives

In addition to the objectives of the Integrated Programme set out in Articles 1 and 2, the operational objectives of the Comenius programme shall be:

- (a) to increase the volume and improve the quality of exchanges involving pupils and educational staff in different Member States;
- (b) to increase the volume and improve the quality of partnerships between schools in different Member States, so as to involve at least one pupil in twenty in joint educational activities during the period of the programme;
- (c) to encourage the learning of a second foreign language;
- (d) to reinforce the quality and European dimension of teacher training;
- (e) to improve pedagogical approaches and school management.

Article 19

Actions

1. The following actions may be supported by the Comenius programme:
 - (a) mobility of individuals as referred to in Article 5(1)(a). In arranging for or supporting the organisation of such mobility, the necessary preparatory measures shall be adopted and care shall be taken to ensure that adequate supervision and support is available for young people in mobility. Such mobility may include:
 - (i) exchanges of pupils and staff;
 - (ii) placements in schools or enterprises abroad for pupils or for educational staff;
 - (iii) participation in training courses for teachers;
 - (iv) study and preparatory visits for mobility, partnership, project or network activities;
 - (v) assistantships for teachers and potential teachers.
 - (b) development of partnerships as referred to in Article 5(1)(b) between schools ('Comenius partnerships'), with a view to developing joint learning projects between the pupils;
 - (c) multilateral cooperation projects as referred to in Article 5(1)(e). They may include projects aimed at:
 - (i) developing, promoting and disseminating new teaching methods or materials;
 - (ii) developing or exchanging experience on systems of providing information or guidance particularly adapted to the learners concerned by the Comenius programme;
 - (iii) developing, promoting and disseminating new teacher training courses or course content;
 - (d) networks as referred to in Article 5(1)(e). They may include networks aimed at:
 - (i) developing education in the discipline or subject area in which they operate, for their own benefit and for that of education more widely;
 - (ii) acquiring and disseminating relevant good practice and innovation;
 - (iii) providing content support to projects and partnerships set up by others;
 - (iv) promoting the development of needs analysis and its practical applications within school education;

- (e) other initiatives aimed at promoting the objectives of the Comenius programme as referred to in Article 5(1)(h) ('Accompanying Measures').
2. The operational details of the actions referred to in paragraph 1 shall be decided in accordance with the procedure referred to in Article 10(2).

Article 20

Budget

Not less than 85% of the budget available for the Comenius programme shall be devoted to support for mobility as referred to in Article 19(1)(a) and for Comenius partnerships as set out in Article 19(1)(b).

Article 21

Implementing measures

1. The measures necessary for the implementation of the Comenius programme relating to the following matters shall be adopted by the Commission in accordance with the management procedure referred to in Article 10(2):
 - (a) the annual plan of work;
 - (b) the annual budget and the distribution of funds between the various actions of the Comenius programme;
 - (c) the general guidelines for implementing the Comenius programme, the selection criteria and procedures;
 - (d) the distribution of funds among the Member States for the actions to be managed through the "National agency procedure" set out in the Annex;
 - (e) the arrangements for monitoring and evaluating the programme and for the dissemination and transfer of results.
2. The measures necessary for the implementation of the Comenius programme relating to all matters other than those specified in paragraph 1 of this Article shall be adopted in accordance with the advisory procedure referred to in Article 10(3).

Chapter II

The Erasmus programme

Article 22

Access to the Erasmus programme

Within the framework of the Integrated Programme, the Erasmus programme is aimed at:

- (a) students and trainees learning in all forms of higher education and advanced vocational education and training (ISCED levels 5 and 6);
- (b) higher education institutions, as specified by Member States;
- (c) teaching and administrative staff within those institutions;
- (d) associations and representatives of those involved in higher education, including relevant student, university, and teacher/trainer associations;
- (e) enterprises, social partners and other representatives of working life;
- (f) public and private organisations responsible for the organisation and delivery of education and training at local and regional levels;
- (g) research centres and bodies concerned with lifelong learning issues.

Article 23

Operational objectives

In addition to the objectives of the Integrated Programme set out in Articles 1 and 2, the operational objectives of the Erasmus programme shall be:

- (a) to increase the volume and improve the quality of student and teaching staff mobility throughout Europe, so as to contribute to the achievement by 2011 of at least 3 million individual participants in student mobility under the Erasmus and its predecessor programmes;
- (b) to increase the volume and improve the quality of multilateral cooperation between higher education institutions in Europe;
- (c) to increase the degree of convergence of higher education and advanced vocational education qualifications gained in Europe;
- (d) to foster co-operation between higher education institutions and enterprises.

Article 24

Actions

1. The following actions may be supported by the Erasmus programme:
 - (a) mobility of individuals as referred to in Article 5(1)(a). Such mobility may include:
 - (i) mobility of students for studies or training abroad in higher education institutions, as well as placements in enterprises, training centres or other organisations;
 - (ii) mobility of teaching staff in higher education institutions in order to teach or receive training in a partner institution abroad;
 - (iii) mobility of other staff in higher education institutions and staff of enterprises for purposes of training or teaching;
 - (iv) Erasmus intensive programmes organised on a multilateral basis.

Support may also be awarded to the home and host higher education institutions or enterprises for action to ensure quality at all stages of the mobility arrangements, including language preparation.

- (b) joint projects as referred to in Article 5(1)(e), focusing *inter alia* on innovation and experimentation in the areas mentioned in the specific and operational objectives;
 - (c) networks as referred to in Article 5(1)(e) run by consortia of higher education institutions and representing a discipline or a cross-disciplinary field, ('Erasmus thematic networks') which aim to develop new learning concepts and competencies. Such networks may also include representatives from other public bodies or from enterprises or associations;
 - (d) other initiatives aimed at promoting the objectives of the Erasmus programme, as referred to in Article 5(1)(h) ('Accompanying Measures').
2. Individuals participating in mobility under paragraph 1(a)(i) ('Erasmus students') shall be:
 - (a) students in higher education institutions who, after completing at least their first year of studies, spend a study period in another Member State within the framework of the mobility Action of the Erasmus programme, regardless whether they have been awarded financial support under that programme. Such periods shall be fully recognised under the interinstitutional agreements between the sending and host institutions. The host institutions shall not charge tuition fees to such students;
 - (b) students enrolled on Joint Masters programmes in a country other than the one in which they gained their Bachelors degree;

- (c) students in higher education institutions taking part in placements in enterprises or training centres.
3. The operational details of the actions set out in paragraph 1 shall be decided following the procedure referred to in Article 10(2).

Article 25

Budget

Not less than 85% of the budget available for the Erasmus programme shall be devoted to support for mobility as referred to in Article 24(1)(a).

Article 26

Implementing measures

1. The measures necessary for the implementation of the Erasmus programme relating to the following matters shall be adopted by the Commission in accordance with the management procedure referred to in Article 10(2):
- (a) the annual plan of work;
 - (b) the annual budget and the distribution of funds between the various actions of the Erasmus programme;
 - (c) the general guidelines for implementing the Erasmus programme, the selection criteria and procedures;
 - (d) the distribution of funds among the Member States for the actions to be managed through the “National agency procedure” set out in the Annex;
 - (e) the arrangements for monitoring and evaluating the programme and for the dissemination and transfer of results.
2. The measures necessary for the implementation of the Erasmus programme relating to all matters other than those specified in paragraph 1 of this Article shall be adopted in accordance with the advisory procedure referred to in Article 10(3).

Chapter III

The Leonardo da Vinci programme

Article 27

Access to the Leonardo da Vinci programme

Within the framework of the Integrated Programme, the Leonardo da Vinci programme is aimed at:

- (a) young people learning in all forms of vocational education and training up to the end of upper secondary education (up to ISCED level 3);
- (b) learners in continuing vocational education and training (ISCED level 4);
- (c) people in the labour market;
- (d) learning providers in the fields covered by the Leonardo da Vinci programme;
- (e) teaching and administrative staff within those learning providers;
- (f) associations and representatives of those involved in vocational education and training, including trainees', parents' and teachers' associations;
- (g) enterprises, social partners and other representatives of working life, including chambers of commerce and other trade organisations;
- (h) bodies providing guidance, counselling and information services relating to any aspect of lifelong learning;
- (i) persons and bodies responsible for systems and policies concerning any aspect of lifelong learning at local, regional and national level;
- (j) research centres and bodies concerned with lifelong learning issues;
- (k) non profit making organisations, voluntary bodies, NGOs.

Article 28

Operational objectives

In addition to the objectives of the Integrated Programme set out in Articles 1 and 2, the operational objectives of the Leonardo da Vinci programme shall be:

- (a) to increase the volume and to improve the quality of mobility throughout Europe of people involved in initial vocational education and training and in continuing training, so as to increase placements in enterprises to at least 150,000 per year by the end of the Integrated Programme;

- (b) to increase the volume and to improve the quality of co-operation between learning providers, enterprises, social partners and other relevant bodies throughout Europe;
- (c) to facilitate the development of innovative practices in the fields of initial and continuing training and their transfer, including from one participating country to others;
- (d) to improve the transparency and recognition of qualifications and competences, including those acquired through non-formal and informal learning.

Article 29

Actions

1. The following actions may be supported by the Leonardo da Vinci programme:
 - (a) mobility of individuals, as referred to in Article 5(1)(a). In arranging for or supporting the organisation of such mobility, the necessary preparatory measures shall be adopted and care shall be taken to ensure that adequate supervision and support is available for people in mobility. Such mobility may include:
 - (i) transnational placements in enterprises or in training institutions;
 - (ii) placements and exchanges aimed at the further professional development of trainers and guidance counsellors, of those responsible for training establishments and for training planning and career guidance within enterprises;
 - (b) partnerships, as referred to in Article 5(1)(b), focusing on themes of mutual interest to the participating organisations;
 - (c) multilateral projects, as referred to in Article 5(1)(c), in particular those aimed at improving training systems through the transfer of innovation involving the linguistic, cultural and legal adaptation to national needs of innovative products and processes developed in different contexts;
 - (d) multilateral projects, as referred to in Article 5(1)(e), aimed at improving training systems through the development and transfer of innovation and good practice;
 - (e) thematic networks of experts and organisations, as referred to in Article 5(1)(e), working on specific issues related to vocational education and training;
 - (f) other initiatives aimed at promoting the objectives of the Leonardo da Vinci programme, as referred to in Article 5(1)(h) ('Accompanying Measures').
2. The operational details of such actions shall be decided following the procedure referred to in Article 10(2).

Article 30

Budget

Not less than 75% of the budget available for the Leonardo da Vinci programme shall be devoted to support for mobility as referred to in Article 29(1)(a).

Article 31

Implementing measures

1. The measures necessary for the implementation of the Leonardo da Vinci programme relating to the following matters shall be adopted by the Commission in accordance with the management procedure referred to in Article 10(2).
 - (a) the annual plan of work;
 - (b) the annual budget and the distribution of funds between the various actions of the Leonardo da Vinci programme;
 - (c) the general guidelines for implementing the Leonardo da Vinci programme, the selection criteria and procedures;
 - (d) the distribution of funds among the Member States for the actions to be managed through the “National agency procedure” set out in the Annex;
 - (e) the arrangements for monitoring and evaluating the programme and for the dissemination and transfer of results.
2. The measures necessary for the implementation of the Leonardo da Vinci programme relating to all matters other than those specified in paragraph 1 of this Article shall be adopted in accordance with the advisory procedure referred to in Article 10(3).

Chapter IV

The Grundtvig programme

Article 32

Access to the Grundtvig programme

Within the framework of the Integrated Programme, the Grundtvig programme is aimed at:

- (a) learners in adult education;
- (b) learning providers in adult education;
- (c) teaching and administrative staff within those learning providers and other organisations involved in adult education;
- (d) establishments involved in the initial or further training of adult education staff;
- (e) associations and representatives of those involved in adult education, including learners' and teachers' associations;
- (f) bodies providing guidance, counselling and information services relating to any aspect of adult education;
- (g) persons and bodies responsible for systems and policies concerning any aspect of adult education at local, regional and national level;
- (h) research centres and bodies concerned with adult education issues;
- (i) enterprises;
- (j) non profit making organisations, voluntary bodies, NGOs;
- (k) higher education institutions.

Article 33

Operational objectives

In addition to the objectives of the Integrated Programme set out in Articles 1 and 2, the operational objectives of the Grundtvig programme shall be:

- (a) to increase the volume and to improve the quality of mobility throughout Europe of people involved in adult education, so as to support the mobility of at least 25,000 of such individuals per year by 2013;
- (b) to increase the volume and to improve the quality of co-operation between organisations involved in adult education throughout Europe;

- (c) to facilitate the development of innovative practices in adult education and their transfer, including from a participating country to others;
- (d) to ensure that people from vulnerable social groups and in marginal social contexts, in particular those who have left education without basic qualifications, are given alternative opportunities to access adult education;
- (e) to improve pedagogical approaches and the management of adult education organisations.

Article 34

Actions

1. The following actions may be supported by the Grundtvig programme:
 - (a) mobility of individuals, as referred to in Article 5(1)(a). In arranging for or supporting the organisation of such mobility, the necessary preparatory measures shall be adopted and care shall be taken to ensure that adequate supervision and support is available for people in mobility. Such mobility may include visits, placements, assistantships and exchanges for participants in formal and non-formal adult education, including the training and professional development of adult education staff.
 - (b) partnerships, as referred to in Article 5(1)(b), known as ‘Grundtvig learning partnerships’, focusing on themes of mutual interest to the participating organisations;
 - (c) multilateral projects, as referred to in Article 5(1)(e), aimed at improving adult education systems through the development and transfer of innovation and good practice;
 - (d) thematic networks of experts and organisations, as referred to in Article 5(1)(e), known as ‘Grundtvig networks’, working in particular on:
 - (i) developing adult education in the discipline, subject area or management aspect to which they relate;
 - (ii) identifying and disseminating relevant good practice and innovation;
 - (iii) providing content support to projects and partnerships set up by others and facilitating interactivity between such projects and partnerships;
 - (iv) promoting the development of needs analysis and quality assurance within adult education.
 - (e) other initiatives aimed at promoting the objectives of the Grundtvig programme, as referred to in Article 5(1)(h) (‘Accompanying Measures’).
2. The operational details of such actions shall be decided following the procedure referred to in Article 10(2).

Article 35

Budget

Not less than 60% of the budget available for the Grundtvig programme shall be devoted to support for mobility and partnerships as referred to in Article 34(1)(a) and (b).

Article 36

Implementing measures

1. The measures necessary for the implementation of the Grundtvig programme relating to the following matters shall be adopted by the Commission in accordance with the management procedure referred to in Article 10(2).
 - (a) the annual plan of work;
 - (b) the annual budget and the distribution of funds between the various actions of the Grundtvig programme;
 - (c) the general guidelines for implementing the Grundtvig programme, the selection criteria and procedures;
 - (d) the distribution of funds among the Member States for the actions to be managed through the “National agency procedure” set out in the Annex;
 - (e) the arrangements for monitoring and evaluating the programme and for the dissemination and transfer of results.
2. The measures necessary for the implementation of the Grundtvig programme relating to all matters other than those specified in paragraph 1 of this Article shall be adopted in accordance with the advisory procedure referred to in Article 10(3).

Chapter V

The Transversal programme

Article 37

Operational objectives

In addition to the general objectives of the Integrated Programme set out in Articles 1 and 2, the operational objectives of the transversal programme shall be:

- (a) to support policy development at European level in lifelong learning, notably in the context of the Lisbon, Bologna and Copenhagen processes and their successors;
- (b) to ensure an adequate supply of comparable data, statistics and analyses to underpin lifelong learning policy development;
- (c) to monitor progress towards objectives and targets in lifelong learning, and to identify areas for particular attention;
- (d) to promote language learning and to support linguistic diversity in the Member States;
- (e) to support the development of innovative ICT-based content, services, pedagogies and practice for lifelong learning;
- (f) to ensure that the results of the Integrated Programme are appropriately recognised, demonstrated and implemented on a wide scale.

Article 38

Actions

1. The following actions may be supported under the key activity referred to in Article 2(2)(a):
 - (a) individual mobility, as referred to in Article 5(1)(a), including study visits for experts and officials designated by national, regional and local authorities, for directors of education and training establishments and guidance services, and for social partners;
 - (b) multilateral projects, as referred to in Article 5(1)(e), aimed at preparing and testing policy proposals developed at Community level;
 - (c) multilateral cooperation networks, as referred to in Article 5(1)(e), of experts and/or institutions working together on policy issues. Such networks may include:

- (i) thematic networks working on issues related to the content of lifelong learning or to lifelong learning methodologies and policies. Such networks may observe, exchange, identify and analyse good practice and innovation, and make proposals for a better and wider use of such practices across the Member States;
- (ii) standing conferences on policy issues, aimed at coordinating policy at European level on strategic issues in lifelong learning;
- (d) observation and analysis of policies and systems in the field of lifelong learning, as referred to in Article 5(1)(f), which may include:
 - (i) studies and comparative research;
 - (ii) development of indicators and statistical surveys, including support for work undertaken in the field of lifelong learning in cooperation with Eurostat ;
 - (iii) support for the operation of the Eurydice network and funding of the Eurydice European Unit set up by the Commission;
- (e) action to support transparency and recognition of qualifications and competences including those acquired through non formal and informal learning, information and guidance on mobility for learning purposes, and cooperation in quality assurance, as referred to in Article 5(1)(f), which may include:
 - (i) networks of organisations which facilitate mobility and recognition, such as Euroguidance and National Academic Recognition Information Centres (NARICs);
 - (ii) support for transnational web-based services such as Ploteus;
 - (iii) activities under the Europass initiative in accordance with Decision XXX of the European Parliament and of the Council adopting a single framework for the transparency of qualifications and competences.
- (f) other initiatives as referred to in Article 5(1)(h) ('Accompanying Measures') aimed at promoting the objectives of the key activity referred to in Article 2(2)(a).

2. The following strategic actions, designed to address teaching and learning needs at more than one life-stage, may be supported under the key activity referred to in Article 2(2)(b):

- (a) multilateral projects, as referred to in Article 5(1)(e), aimed, *inter alia*, at:
 - (i) developing new language learning materials, including online courses, and instruments for language testing;
 - (ii) developing tools and courses for language teacher training;

- (b) networks as referred to in Article 5(1)(e), in the field of language learning and linguistic diversity;
 - (c) other initiatives in line with the objectives of the Integrated Programme, as referred to in Article 5(1)(h), including activities to make language learning more attractive to learners through the mass media and/or marketing, publicity and information campaigns, as well as conferences, studies and statistical indicators in the field of language learning and linguistic diversity.
3. The following actions may be supported under the key activity referred to in Article 2(2)(c):
- (a) multilateral projects, as referred to in Article 5(1)(e), aimed at the development and distribution of innovative methods, contents, services and environments;
 - (b) networks as referred to in Article 5(1)(e), aimed at sharing and exchanging knowledge, experience and good practice;
 - (c) other action aimed at improving lifelong learning policy and practice, as described in Article 5(1)(f), which may include mechanisms for evaluation, observation, benchmarking, quality improvement and the analysis of trends with respect to technology and pedagogy.
4. The following actions may be supported under the key activity referred to in Article 2(2)(d):
- (a) unilateral and national projects, as referred to in Article 5(1)(d);
 - (b) multilateral projects, as referred to in Article 5(1)(e), aimed *inter alia* at:
 - (i) supporting the exploitation and implementation of innovative products and processes;
 - (ii) stimulating cooperation between projects operating in the same field;
 - (iii) developing good practice with regard to dissemination methods;
 - (c) the establishment of reference material as referred to in Article 5(1)(f), which may include the collection of relevant statistical data and studies in the field of dissemination, the exploitation of results and the exchange of good practice.

Article 39

Implementing measures

1. The measures necessary for the implementation of the transversal programme relating to the following matters shall be adopted by the Commission in accordance with the management procedure referred to in Article 10(2):
- (a) the annual plan of work, and the selection criteria and procedures;

- (b) the annual budget and the distribution of funds between the various actions of the transversal programme;
 - (c) the guidelines for implementing the transversal programme and its key activities;
 - (d) the distribution of funds among the Member States for the actions to be managed through the “National agency procedure” set out in the Annex;
 - (e) the arrangements for monitoring and evaluating the programme and for the dissemination and transfer of results.
2. The measures necessary for the implementation of the transversal programme relating to all matters other than those specified in paragraph 1 of this Article shall be adopted in accordance with the advisory procedure referred to in Article 10(3).

Chapter VI

The Jean Monnet programme

Article 40

Access to the Jean Monnet programme

Within the framework of the Integrated Programme and the Annex, the Jean Monnet programme is aimed at:

- (a) students and researchers in the field of European integration in all forms of higher education (ISCED levels 5 and 6) within and outside the Community;
- (b) higher education institutions within and outside the Community;
- (c) teaching and administrative staff within those institutions;
- (d) associations and representatives of those involved in education and training within and outside the Community;
- (e) public and private organisations responsible for the organisation and delivery of education and training at local and regional levels;
- (f) research centres and bodies concerned with issues relating to European integration within and outside the Community.

Article 41

Operational objectives

In addition to the general objectives of the Integrated Programme set out in Articles 1 and 2, the operational objectives of the Jean Monnet programme shall be:

- (a) to stimulate excellence in teaching, research and reflection in European integration studies in higher education institutions within and outside the Community;
- (b) to enhance knowledge and awareness among specialist academics and among European citizens generally of issues relating to European integration;
- (c) to support key European institutions dealing with issues relating to European integration;
- (d) to support the existence of high-quality European associations active in the fields of education and training.

Article 42

Actions

1. The following actions may be supported under the key activity referred to in Article 2(3)(a):
 - (a) unilateral and national projects, as referred to in Article 5(1)(d), which may include:
 - (i) Jean Monnet Chairs, centres of excellence and teaching modules;
 - (ii) associations of professors, other teachers in higher education, and researchers specialising in European integration;
 - (iii) support for young researchers specialising in European integration studies;
 - (iv) information and research activities relating to the Community with the aim of promoting discussion, reflection and knowledge about the process of European integration;
 - (b) multilateral projects and networks, as referred to in Article 5(1)(e), which may include support for the establishment of multilateral research groups in the field of European integration.
2. Operating grants as referred to in Article 5(1)(g) to support certain operational and administrative costs of the following institutions pursuing an aim of European interest may be awarded under the key activity referred to in Article 2(3)(b):
 - (a) the College of Europe (Bruges and Natolin campuses);
 - (b) the European University Institute, Florence;
 - (c) the European Institute of Public Administration, Maastricht;
 - (d) the Academy of European Law, Trier.
3. Under the key activity referred to in Article 2(3)(c), operating grants as referred to in Article 5(1)(g) may be awarded to support certain operational and administrative costs of European institutions or associations active in the fields of education and training.
4. Grants may be awarded on an annual basis or on a renewable basis within a framework partnership agreement with the Commission.

Article 43

Budget

Not less than 28% of the budget available for the Jean Monnet programme shall be devoted to support for the key activity referred to in Article 2(3)(a), not less than 44% to the key activity

referred to in Article 2(3)(b), and not less than 18% to the key activity referred to in Article 2(3)(c).

Article 44

Implementing measures

1. The measures necessary for the implementation of the Jean Monnet programme relating to the following matters shall be adopted by the Commission in accordance with the management procedure referred to in Article 10(2):
 - (a) the annual plan of work, and the selection criteria and procedures;
 - (b) the annual budget and the distribution of funds between the various actions of the Jean Monnet programme;
 - (c) the guidelines for implementing the Jean Monnet programme and its key activities;
 - (d) the arrangements for monitoring and evaluating the programme and for the dissemination and transfer of results.
2. The measures necessary for the implementation of the Jean Monnet programme relating to all matters other than those specified in paragraph 1 of this Article shall be adopted in accordance with the advisory procedure referred to in Article 10(3).

TITLE III

TRANSITIONAL AND FINAL PROVISIONS

Article 45

Transitional provision

Actions which are initiated on or before 31 December 2006 on the basis of Decision 382/1999/EC²⁸, of Decision 253/2000/EC²⁹, of Decision 2318/2003/EC³⁰, of Decision 791/2004/EC³¹ or of Decision [Europass]³², shall be administered in conformity with the provisions of those Decisions, with the exception that the committees established by those Decisions shall be replaced by the committee established by Article 10 of the present Decision.

Article 46

Entry into force

This Decision shall enter into force on the twentieth day following the date of its publication in the *Official Journal of the European Union*.

Done at Brussels,

For the European Parliament
The President

For the Council
The President

²⁸ OJ L 146, 11.6.1999, p.33.
²⁹ OJ L 28, 3.2.2000, p.1.
³⁰ OJ L 345, 31.12.2003, p.9.
³¹ OJ L 138, 30.4.2004, p.31.
³² OJ

ANNEX

ADMINISTRATIVE AND FINANCIAL PROVISIONS

A. Administrative Provisions

Procedures for the proposal and selection of the activities contained in the Integrated Programme are as follows:

1. National agency procedure

1.1 Procedure 1

The following actions, under which the selection decisions are taken by the appropriate national agencies, shall be managed through the ‘National agency procedure 1’:

- (a) the trans-national mobility of people in lifelong learning in Europe, as referred to in Article 5(1)(a);
- (b) bilateral and multilateral partnerships, as referred to in Article 5(1)(b);
- (c) unilateral and national projects, as referred to in Article 5(1)(d), where these are funded under Article 38(4)(a).

Requests for financial assistance submitted under these actions shall be directed to the appropriate national agencies designated by the Member States in accordance with Article 6(2)(b). The national agencies shall carry out the selection and allocate financial assistance to the applicants selected in accordance with the general guidelines to be established under Articles 9, 21, 26, 31, 36 and 39. The national agencies shall distribute grants to beneficiaries located in their respective Member States. Each partner in a bilateral or multilateral partnership shall receive funding direct from its respective national agency.

1.2 Procedure 2

The following action, under which the selection decisions are taken by the Commission, but evaluation and contracting procedures are undertaken by the appropriate national agencies, shall be managed through the ‘National agency procedure 2’:

- multilateral projects, as referred to in Article 5(1)(c).

Requests for financial assistance submitted under this action shall be directed to the national agency designated by the Member State of the coordinator of the project in accordance with Article 6(2)(b). The national agency of the Member State of the coordinator of the project shall carry out the evaluation of applications and submit to the Commission a shortlist of applications which it proposes to accept. The Commission shall decide upon the shortlist proposed, following which the National Agency shall allocate the appropriate financial assistance to the applicants selected in accordance with the general guidelines to be established under Article 31. Before submitting the shortlist to the Commission, the national agency of the country in which the project is coordinated shall liaise with those in the

countries of all the other project partners. The national agencies shall distribute grants to selected project coordinators located in their respective Member States, which shall be responsible for distributing the funds to the partners involved in the projects.

2. Commission procedure

The following actions, under which project proposals are submitted to the Commission and the selection decisions are taken by the Commission, shall be managed through the ‘Commission procedure’:

- (a) unilateral and national projects, as referred to in Article 5(1)(d), except those funded under Article 38(4)(a);
- (b) multilateral projects and networks, as referred to in Article 5(1)(e);
- (c) observation and analysis of policies and systems in the field of lifelong learning, the establishment of reference material, including surveys, statistics, analyses and indicators, and action to support transparency and recognition of qualifications and prior learning, as referred to in Article 5(1)(f);
- (d) operating grants, as referred to in Article 5(1)(g);
- (e) other initiatives in line with the objectives of the Integrated Programme, (‘Accompanying Measures’) as referred to in Article 5(1)(h).

Requests for financial assistance submitted under these actions shall be directed to the Commission, which shall carry out the selection and allocate financial assistance to the applicants selected in accordance with the general guidelines to be established under Articles 9, 21, 26, 31, 36, 39 and 44.

B. Financial Provisions

The Commission shall ensure that the financial and administrative requirements placed on beneficiaries of grants awarded under the Integrated Programme are proportionate to the level of the grant. In particular, the Commission shall ensure that the financial rules and the application and reporting requirements for individual mobility and for partnerships remain user-friendly and sufficiently simple not to restrict access for less advantaged individuals and the institutions or organisations that work with them.

1. Actions managed through the National agency procedure

- 1.1 The Community funds intended to provide financial support under the actions to be managed through the National agency procedure in accordance with Section A Point 1 of this Annex, are to be allocated among the Member States in accordance with formulae determined by the Commission in accordance with Article 10(2), which may include elements such as the following:

- (a) a minimum amount allocated to each Member State, to be determined in accordance with budgetary availability for the action concerned;
- (b) the remainder will be allocated to the various Member States on the basis of:
 - (i) the difference in the cost of living between the Member States;
 - (ii) the distance between the capital cities of each of the Member States;
 - (iii) the level of demand and/or take-up for the Action concerned within each Member State;
 - (iv) each Member State's total number of:
 - pupils and teachers in school education for the school partnerships and mobility actions of the Comenius programme set out in Article 19(1)(a) and (b);
 - students and/or graduates in higher education for the mobility of students and intensive programmes actions of the Erasmus programme set out in Article 24(1)(a)(i) and (iv);
 - teachers in higher education institutions for the mobility of teachers and the mobility of other staff actions of the Erasmus programme set out in Article 24(1)(a)(ii) and (iii);
 - overall population and number of 15 to 35 year olds in relation to it, for the mobility, partnerships and bilateral and multilateral projects actions of the Leonardo da Vinci programme set out in Article 29(1)(a), (b) and (c).
 - adults for the mobility and partnership actions of the Grundtvig programme set out in Article 34(1)(a) and (b).

1.2 The Community funds thus distributed shall be administered by the national agencies provided for in Article 6(2)(b).

1.3 The Commission, acting in cooperation with the Member States, shall take the necessary measures to encourage balanced participation at Community, national and, where appropriate, regional level and, where appropriate, across the various fields of study. The proportion allocated to these measures shall not exceed 5% of the annual budget for financing each of the actions in question.

2. Designation of beneficiaries

The institutions listed in Article 42(2) of the present Decision are hereby designated beneficiaries of grants under the Integrated Programme, in accordance with Article 168 of Commission Regulation No 2342/2002.

The constituent national units of the NARIC network, the Eurydice network, the Euroguidance network, the National Reference Points for Vocational Qualifications and the Europass National Centres act as instruments to implement the programme at national level,

in conformity with the provisions of Article 54(2)(c) of Council Regulation No 1605/2002 and of Article 38 of Commission Regulation No 2342/2002.

3. Types of beneficiary

In accordance with Article 114(1) of Council Regulation No 1605/2002, grants may be awarded to natural persons. These may take the form of scholarships.

4. Flat-rate grants, scales of unit costs and prizes

Flat-rate grants and/or scales of unit costs, as provided for in Article 181(1) of Commission Regulation No 2342/2002 may be used in the case of the actions referred to in Article 5.

The Commission may provide for the award of prizes in relation to activities undertaken in the framework of the Integrated Programme.

5. Bodies pursuing an objective of general European interest

Where operating grants are awarded under this programme to bodies pursuing an objective of general European interest as defined in Article 162 of Commission Regulation No 2342/2002, these shall, in accordance with Article 113(2) of Council Regulation No 1605/2002, not be subject on renewal to the principle of gradual decrease.

6. Applicants' professional competencies and qualifications

The Commission may decide in accordance with Article 176(2) of Commission Regulation No 2342/2002 that specified categories of beneficiaries have the professional competencies and qualifications required to complete the proposed action or workplan.

7. Participation of partners from third countries

Partners from third countries may participate in multilateral projects, networks or partnerships under the terms of Article 15(2) at the discretion of the Commission or the national agency concerned. The decision whether to support such partners shall be based on the degree of added value at European level likely to result from their participation in the project, network or partnership in question.

8. Minimum allocations

Subject to Article 15 of this Decision, the minimum amounts to be allocated to sectoral programmes shall be, in relation to the financial framework set out in that Article:

Comenius	10%
Erasmus	40%
Leonardo da Vinci	25%
Grundtvig	3%

9. National Agencies

Community financial assistance shall be provided to support the activities of the national agencies established or designated by the Member States in accordance with Article 6(2)(b). Such assistance may be provided in the form of operating grants and shall not exceed 50% of the total eligible costs of the approved work programme of the national agency.

In accordance with Article 38(1) of Commission Regulation No 2342/2002, the function of National Agency may, in third countries participating in the Integrated Programme by virtue of Article 7(1) of the current Decision, be discharged of public-sector bodies or private-law bodies with a public-service mission governed by the law of the country concerned.

10. Technical assistance

The budgetary envelope of the Integrated Programme may also cover expenditure related to preparatory actions, monitoring, control, audit and evaluation directly necessary for the implementation of the programme and for the achievement of its objectives. These may in particular include studies, meetings, information activities, publications, expenditure on informatics networks for the exchange of information and any other expenditure on technical and administrative assistance to which the Commission may need to have recourse for the implementation of the programme.

11. Anti-fraud provisions

Commission decisions taken under Articles 9, 21, 26, 31, 36, 39 and 44, the contracts and agreements resulting from them, as well as agreements with participating third countries, shall provide in particular for supervision and financial control by the Commission (or any representative authorized by it), including by OLAF, and for audits by the Court of Auditors, if necessary on-the-spot. Such controls may be carried out with national agencies, as well, where necessary, as with recipients of grants.

The beneficiary of an operating grant shall keep available for the Commission all the supporting documents, including the audited financial statement, regarding expenditure incurred during the grant year, for a period of five years following the last payment. The beneficiary of a grant shall ensure that, where applicable, supporting documents in the possession of partners or members be made available to the Commission.

The Commission may have an audit of the use made of the grant carried out either directly by its own staff or by any other qualified outside body of its choice. Such audits may be carried out throughout the lifetime of the agreement and for a period of five years from the date of payment of the balance. Where appropriate, the audit findings may lead to recovery decisions by the Commission.

Commission staff and outside personnel authorised by the Commission shall have appropriate right of access, in particular to the beneficiary's offices and to all the information, including information in electronic format, needed in order to conduct such audits.

The Court of Auditors and the European Anti-Fraud Office (OLAF) shall enjoy the same rights, especially of access, as the Commission.

In addition, the Commission may carry out on-the-spot checks and inspections under this programme in accordance with Council Regulation (Euratom, EC) No 2185/96.

For the Community actions financed under this decision, the notion of irregularity referred to in Article 1, paragraph 2 of Regulation (EC, Euratom) No 2988/95 shall mean any infringement of a provision of Community law or any breach of a contractual obligation resulting from an act or omission by a legal entity, which has, or would have, the effect of prejudicing the general budget of the Communities or budgets managed by them, by an unjustified item of expenditure.

LEGISLATIVE FINANCIAL STATEMENT

Policy area(s): Education and culture

Activit(y/ies): Education and training

TITLE OF ACTION: INTEGRATED PROGRAMME IN THE FIELD OF LIFELONG LEARNING

1. BUDGET LINE(S) + HEADING(S)

15 02 02 02 (Integrated Programme); 15 01 04 02 (Integrated Programme administrative expenditure); 15 01 04 30 (Executive Agency Education and Culture)

2. OVERALL FIGURES

2.1. Total allocation for action : € 13,620 million for commitment

2.2. Period of application:

2007-2013

2.3. Overall multiannual estimate of expenditure:

(a) Schedule of commitment appropriations/payment appropriations (financial intervention) *(see point 6.1.1)*

Cash prices € million *(to 3rd decimal place)*

	2007	2008	2009	2010	2011	2012	2013*	Total
Commitments	1,188.387	1,354.122	1,580.870	1,821.283	2,137.838	2,466.274	2,816.497	13,365.271
Payments	934.587	1,259.922	1,525.970	1,763.083	2,068.938	2,383.974	3,428.797	13,365.271

* 2013 et seq for payments

(b) Technical and administrative assistance and support expenditure *(see point 6.1.2)*

Cash prices € million *(to 3rd decimal place)*

	2007	2008	2009	2010	2011	2012	2013*	Total
Commitments	31.413	32.978	36.530	37.317	38.062	38.826	39.603	254.729
Payments	31.413	32.978	36.530	37.317	38.062	38.826	39.603	254.729

* 2013 et seq for payments

Cash prices € million (to 3rd decimal place)

Subtotal a + b	2007	2008	2009	2010	2011	2012	2013*	Total
Commitments	1,219.800	1,387.100	1,617.400	1,858.600	2,175.900	2,505.100	2,856.100	13,620.000
Payments	966.000	1,292.900	1,562.500	1,800.400	2,107.000	2,422.800	3,468.400	13,620.000

* 2013 et seq for payments

(c) Overall financial impact of human resources and other administrative expenditure
(see points 7.2 and 7.3)

2004 prices € million (to 3rd decimal place)

	2007	2008	2009	2010	2011	2012	2013	Total
Commitments / payments	27.336	29.513	31.691	31.691	31.691	31.691	31.691	215.303

Mixed cash and 2004 prices € million (to 3rd decimal place)

TOTAL a+b+c	2007	2008	2009	2010	2011	2012	2013*	Total
Commitments	1,247.136	1,416.613	1,649.091	1,890.291	2,207.591	2,536.791	2,887.791	13,835.303
Payments	993.336	1,322.413	1,594.191	1,832.091	2,138.691	2,454.491	3,500.091	13,835.303

* 2013 et seq for payments

2.4. Compatibility with financial programming and financial perspective

[X] Proposal is compatible with the Commission's February 2004 Communication on the financial perspective 2007-2013 (COM(2004)101).

Proposal will entail reprogramming of the relevant heading in the financial perspective.

Proposal may require application of the provisions of the Interinstitutional Agreement.

2.5. Financial impact on revenue:

[X] Proposal has no financial implications (involves technical aspects regarding implementation of a measure)

OR

Proposal has financial impact – the effect on revenue is as follows:

3. BUDGET CHARACTERISTICS

Type of expenditure		New	EFTA contribution	Contributions from applicant countries	Heading in financial perspective
Non-comp	Diff	NO	YES	YES	1.a

4. LEGAL BASIS

Treaty establishing the European Community, Articles 149(4) and 150(4).

5. DESCRIPTION AND GROUNDS

5.1. Need for Community intervention

5.1.1. Objectives pursued

The needs addressed by this programme derive from the challenges facing education and training systems in all Member States to respond to new economic, social and demographic demands, notably:

- In **economic terms**, the main need is to contribute to achievement of the goal set at the Lisbon European Council in 2000 for the European Union to become the most competitive and dynamic knowledge-based economy in the world, in response to globalisation and the challenges of a new knowledge-driven economy. In order to achieve this goal, high-quality education and training systems are essential, as the Barcelona Council recognised in 2002, setting the objective that European education and training systems should become a world quality reference by 2010.
- In **social terms**, as a result of globalisation and new communication technologies on the one hand, and the impact of the European single market on the other, society continues to become more culturally diverse and more interlinked with other societies in Europe and around the world. Education and training are prerequisites to promote greater social cohesion and active citizenship and to fight against exclusion. Equal opportunities must be offered to all citizens in Europe, irrespective of any kind of differences between them. Every effort must be made to provide those who have left education without basic qualifications with alternative second chance opportunities of access to education and training suited to their needs.
- In **demographic terms**, the ageing population of Europe, combined with the increasing need to undertake flexible education and training throughout life in response to new patterns of employment based on greater mobility and more rapid changes of job profiles, represent a significant new challenge for education and training over the coming decade. Modern societies are therefore confronted with the need to offer adequate provisions to face the very diversified demand for education and training supply throughout life.

As a complement to action taken at Member State level, there is an increasingly significant role for European cooperation in tackling the needs outlined above, and the experience of almost two decades of Community programmes in the field of education and training³³ give a strong base on which this proposal builds. The current proposal responds to the emergence of lifelong learning as a paradigm for the organisation of education and training in the knowledge society, and to clear messages from the evaluation and consultation process (see below), by providing for a single integrated programme in the field of lifelong learning, encompassing the current Socrates and Leonardo da Vinci programmes, which will allow for greater synergies, flexibility and efficiency. The integrated programme will contain four sectoral programmes focusing on general school education (Comenius), higher education and advanced vocational training (Erasmus), initial and continuing vocational training (Leonardo), and adult education (Grundtvig). These sectoral programmes will be complemented by a transversal programme focusing on four cross-cutting issues, namely: support for policy development; language learning; new information and communication technologies; and dissemination and exploitation of results. Finally, the integrated programme will contain a programme, named the Jean Monnet programme, focusing on European integration teaching and research in higher education, and on support for key European institutions and associations in education and training.

The general objective of the integrated programme derives from the Lisbon and Barcelona European Councils and aims to contribute through lifelong learning to the development of the European Union as an advanced knowledge society, with sustainable economic development, more and better jobs and greater social cohesion. It also aims to contribute to the development of education and training systems within the European Union so that they become a world quality reference.

This general objective divides into a sequence of specific objectives, the majority of which apply to the programme as a whole, and some of which are particular to one of its constituent programmes. Finally, each of the sectoral programmes, the transversal programme and the Jean Monnet programme has its own operational objectives. A full list of the specific and operational objectives and their related indicators is annexed to the combined ex-ante evaluation and extended impact assessment for this proposal.

The operational objectives contain a number of quantified outcomes related directly to the functioning of the programme, which are set out in Section 5.2 below, under the action to which they relate.

5.1.2. Measures taken in connection with ex ante evaluation

This programme proposal is built on a series of existing Community measures, some of which have been operational for many years, and which have been the subject of a comprehensive sequence of evaluations,³⁴ as well as a substantial corpus of

³³ Notably Socrates and Leonardo da Vinci (phase 1 of which covered 1995-99, and phase 2, 2000-2006), and their predecessor programmes in the field of education (Erasmus, Lingua) and training (Comett, Petra, Force and Eurotecnet).

³⁴ For the most recent texts see:
http://europa.eu.int/comm/education/programmes/evaluation/evaluation_en.html

experience of administering and implementing the programmes in the Commission (and technical assistance office) and within the Member States and other participating countries (particularly within the National Agencies).

This programme proposal has been the subject of both an ex-ante evaluation and an extended impact assessment, the results of which are reported in a single document incorporating both.³⁵ The exercise is based in particular on:

- A public consultation on the future development of Community programmes in the field of education, training and youth after 2006, which ran from November 2002 to February 2003.³⁶
- Two series of thirty national reports on the implementation of the second phases of Socrates and Leonardo da Vinci in each of the participating countries, submitted to the Commission in autumn 2003.³⁷
- Two interim evaluation reports of the current Socrates and Leonardo da Vinci programmes, the key findings of which are set out in section 5.1.3 below.³⁸
- Assessments undertaken within the Commission of the different options for structuring and administering the new lifelong learning integrated programme during the summer and autumn of 2003, the main results of which are summarised in the extended impact / ex ante evaluation paper.

The key messages resulting from the public consultation process are as follows:

- Great enthusiasm for the programmes. Although there may be difficulties with their operation, the vast majority of respondents underline their commitment to the programmes and the trans-national work they enable.
- A belief that the programmes should contribute both to the development of European citizenship, and to the teaching of languages, and should support the regional dimension more strongly. Many respondents believed that the issues of citizenship, of inter-culturality, of the European dimension represented a need which the programmes were well placed to respond to; several respondents believed that strengthening language learning was an important need at European level.
- A very strong feeling that the programmes are bureaucratic, inflexible, and over-complicated, particularly in regard to the very small amount of most grants. Many respondents regarded this as the worst aspect of the programmes. There is a clear

³⁵ Reference

³⁶ The consultation was based on a working document published by the Commission in November 2002, which set out the main issues concerning the future generation of programmes and the key questions on which comments were requested. It was conducted by means of an online response form available on the Europa website during the consultation period, complemented with the possibility to send written responses directly to the Commission. A detailed report on the responses to this consultation exercise was prepared for the Commission by the Pôle Universitaire Européen de Lorraine and can be consulted online at: <http://europa.eu.int/comm/education/newprogconsult/report.pdf>.

³⁷ Also available at: http://europa.eu.int/comm/education/programmes/evaluation/evaluation_en.html

³⁸ COM(2004)152 (Leonardo da Vinci); COM(2004)153 (Socrates).

message about increased flexibility, about proportionality in the relationship between the size of grants and the application and reporting procedures involved and the financial rules applied to the grant, and about the need for a sense of trust between those awarding the grants and those entrusted with carrying out the work.

- A view that indirect centralised procedures³⁹ were simpler and more user-friendly than those handled directly by the Commission. A significant number of respondents expressed this view. A smaller majority considered that centralised administration was more apt to foster the European dimension of the activity, and represented a more equitable selection process.
- Keep the existing sectoral programmes and actions, but also relate education and training much more closely. This apparent contradiction illustrates the tension between a desire to keep familiar identified programme definitions and the realisation that aims of education and training are not to be dissociated. It is to be noted that this contradiction did not come from different sets of people or organisations, each reflecting one coherent opinion, but were inherent to many individual responses.
- Keep the youth programme entirely separate. This was a unanimous wish, people involved in the informal sector seeing no advantage in losing their "identity", as they thought, by being included within an integrated programme, where formal structures might discourage the enthusiasm of a lot of actors within the voluntary sector.

5.1.3. *Measures taken following ex post evaluation*

The key findings of the interim reports of the Socrates and Leonardo da Vinci programmes are as follows:

- The coverage and focus of the programme actions are generally regarded as valuable and appropriate. In contrast to the first phase of the programmes, there are no actions in the second phase that are felt to be of very limited worth. Indeed, the response of users to the existence and nature of European co-operation support in the field is almost universally positive.
- The administrative and financial procedures have improved since the first phase, but are still experienced as disproportionately burdensome and slow. The greater degree of decentralisation of the second phase of the programmes has been a success in overall terms. However, both in the centralised and indirect centralised actions, the level of financial and administrative detail required of participants in relation to relatively low levels of grant, the near-constant change of these requirements imposed by the Commission, and the complexity and slowness of the contractual and financial procedures, all constitute a barrier to participation in our programmes.
- There is a need for more synergy and coherence between actions and programmes. Despite the efforts made in the design of the second phase to

³⁹ Those handled by the National Agencies – previously referred to as “decentralised”.

introduce more parallelism between Socrates and Leonardo da Vinci, and to provide for joint actions between them and with the Youth programme, the programmes are still viewed by their users as inadequately linked, which militates against the sort of cross-cutting activity between education and training that is likely to become yet more important in the lifelong learning perspective. The current structure is frequently seen as an obstacle to providing the right level of support for policy developments in the fields of education and training.

- The good results achieved under the programmes are not well disseminated. Disseminating the outcomes of actions supported under the programmes, whether these be products or co-operation processes, and spreading good practice is a hard task made more difficult by the need to overcome national cultural and structural barriers. Again, progress has been made in this area compared with the first phase, with the establishment of a team within the administration of Leonardo da Vinci dedicated to dissemination and utilisation of results, and with the inception of specialised dissemination projects within Socrates. But the evaluation clearly demonstrates that these efforts do not go far enough and that there remains substantial potential resulting from the actions supported under the programmes that is not widely known or acted on.
- There are flaws in legislative design of the programmes. The evaluators found a number of flaws in the Socrates and Leonardo da Vinci Decisions. The most important of these was the excessive detail included in the annexes concerning the implementation of the programme actions. These reflected the best attempt of the legislator in 1998/99 to provide in detail for projected needs and requirements up to 2006. However experience has showed the impossibility of predicting accurately in such detail, with the result that the legislative requirements have increasingly stood in the way of adaptations to the programmes to cater for developments in the field of education and training. In one case the requirements were found to be so misconceived as to risk eliminating thousands of participants from Socrates, and necessitated an amendment to the Decision adopted by the Parliament and the Council to remove the problem.

These messages have been reflected in the design of the draft Decision. In particular:

- The design of the programme Decision has been conceived so as to maximise flexibility to adapt to new challenges during the period 2007-13, by formulating actions in as generic a way as possible.
- The introduction of an integrated programme is intended to maximise scope for synergy between the fields it covers.
- A higher proportion of the programme funds will be managed through the indirect centralised procedure, and the management procedures simplified, notably through creation of a single programme committee that will meet in different formations according to the subjects under consideration.
- The need for stronger links with the policy development process and better dissemination arrangements is recognised in the creation of the policy development and dissemination Key Activities in the Transversal Programme.

As far as greater proportionality in financial rules is concerned, the financial and administrative annex to the draft Decision contains a number of interpretations of aspects of the Community Financial Regulation or its Implementing Rules, where these are provided for in that legislation. In order for the Integrated Programme to be in a position to realise its quantified objectives, however, further simplification will be necessary. This may take the form either of amendments to the Financial Regulation or its Implementing Rules directly, or of additional provisions in the annex to this programme Decision which would have the effect of introducing limited amendments to particular provisions of the financial rules, applicable to financial operations under the Integrated Programme only. The Commission is undertaking a parallel exercise on financial simplification, and the necessary amendments will be proposed in the light of the outcome of that exercise.

5.2. Action envisaged and budget intervention arrangements

Methods of management

For the management of this programme, the Commission plans to resort to two forms of externalisation, delegating the management of certain sections of the programme, in accordance with Article 54 of the Financial Regulation, either to national agencies, or to an executive agency. A part of the actions will, however, remain managed in the Commission departments.

Centralised indirect management through national agencies

Recourse to national agencies is required firstly, because of the volume of interventions within the programme, in particular in the mobility actions: the Commission does not have the resources to manage these actions within its services. The very substantial numbers of beneficiaries involved have, in fact, required recourse to such agencies ever since the very first programmes in the field of education and training; this model has slowly been consolidated, and is at present fully recognised by the Financial Regulation.

But there are also qualitative reasons for having recourse to national agencies. These agencies have the advantage of knowing the national context and priorities; they can create a more user-friendly environment for the final beneficiaries; they can provide the appropriate guarantees in a context of strengthened supervision (which includes a precise definition of the respective responsibilities of the Commission and of the national authorities on the issue). In addition, national agencies are often better placed than an institution at central European level to ensure an effective monitoring of the activities supported by the programme, since they are closer to final beneficiaries and know the local context better. They also constitute an effective information relay at national level for the Community programme.

The Commission considers that it is appropriate to decentralise actions where one or more of the following conditions apply:

- It can reasonably be assumed that a rational method of distributing budgetary resources between Member States can be identified that will match the rate of occurrence of the activity across Member States;
- The actions themselves are small-scale or addressed to individuals, so that the full panoply of application and selection at European level is not warranted;

- The actions address needs specific to individual Member States, and should therefore respond to priorities set within that Member State if they are to have an appropriate impact on national policy and practice.

On this basis, the main sections of the programme concerned by this approach are as follows:

- Mobility, partnership and preparatory visit actions within the Comenius, Erasmus, Leonardo and Grundtvig programmes (Article 19(1)(a) and (b), Article 24(1)(a), Article 29(1)(a) and (b), and Article 34(1)(a) and (b));
- Multilateral projects aimed at improving training systems through the transfer of innovation under Article 29(1)(c).

Having recourse to this method of management does not prejudice the visibility of Community action; the agreements made with national agencies require them to indicate the support of the Union for the actions they manage. These agreements also set out requirements as regards non-discrimination in the grant of Community support, as well as the requirements for avoiding conflicts of interest. In accordance with the communication from the Commission to the European Parliament and the Council relating to the Community programme management by national agency networks⁴⁰, national agency agreements will be covered by a Commission Decision adopting provisions setting out the responsibilities of the Commission and the participating countries with regard to national agencies, within the overall context of the general guidelines for implementing the programme.

Article 6.2 of the draft decision shows the criteria that it is proposed to use for the designation of national agencies by the authorities of participating countries.

Centralised indirect management through an executive agency

For other parts of the programme, the Commission plans to delegate to an executive agency. Such an agency is envisaged in the context of the current generation of education and culture programmes (generally to replace the technical assistance offices which have been maintained on a transitional basis); it is proposed to extend the life of this agency, so as also to delegate to it management tasks relating to the 2007-2013 generation of programmes, including the Integrated Lifelong Learning programme

The internal resources of the Commission are insufficient to meet the management needs of all sections of the programme which have to be managed centrally; hence the need under previous programmes to have recourse first to technical assistance offices, then to the executive agency. In addition, it would not be possible to go further with decentralization to national agencies than is currently envisaged; it would amount to delegating to these agencies the management of activities which would not meet the criteria set out above.

Recourse to an executive agency thus constitutes a basis for sound management of centrally managed activities, making optimum use of resources. This approach is based on the idea that the administration should be re-centred on its core activities and priority functions, with the technical implementation of the programmes being carried out by a specialised entity with the necessary resources.

⁴⁰ COM (2001) 648 final of 13.11.2001.

It is proposed that there should only be one executive agency to assist the Commission in the management of all its programmes in the field of education and culture, so as to ensure consistency in treatment and procedure throughout the various programmes, as well as economy. A cost-benefit study carried out before the creation of the agency for the programmes of the current generation concluded that this was an economic approach.

Direct management through Commission departments

Activities managed centrally are not all equally strategic. Some are more sensitive than others (experimental nature, relationship to topical political questions, recipients concerned); it is appropriate that the Commission should retain direct management of a limited number of such projects. This element was taken into account in the distribution between the Commission and the executive agency of the various activities to be managed from Brussels. Managing a certain number of projects within the Commission will also contribute to preserving a suitable level of know-how as regards project management, which will help guarantee the quality of supervision of the executive agency and the national agencies.

Moreover, the management of those parts of the programme entrusted to national agencies will require significant resources at central level (setting the guidelines for national agencies, in accordance with the priorities adopted by the Commission; management of the contractual relations between the Commission and national agencies; follow-up and supervision of management by national agencies). However, it would not be desirable to entrust these tasks to the executive agency, i.e. externalising the monitoring of another externalisation. It has therefore been decided to regard the two externalization options – to an executive agency or to a network of national agencies – as mutually exclusive. Similarly, central exploitation of actions managed by national agencies will be done by the Commission and not by the executive agency.

There will thus be three methods of management within the programme: management by an executive agency; management by national agencies; and direct management by the Commission.

Each action will be managed by the method which is most suited to it, in the respect of the general guidelines on externalisation and while taking care to avoid any overlap with the other two methods. In this way, the coexistence of three methods of management will not create confusion. Nonetheless, where appropriate, procedures and tools common to the three methods of management will be used. In addition, the Commission will consolidate programme management data, whatever the method of management used.

5.2.1. National Agency procedure actions

This section presents sequentially the major National Agency procedure actions of each of the four sectoral programmes. All these actions will be implemented via National Agencies in each Member State, which are responsible for selection of project proposals and for the allocation of Community funds within a contractual framework provided with the Commission.

Individual mobility

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
In-service training for teachers	Grants to individuals	1,400	2,176 (1,900)	101,829	221.625
Work-experience for future language teachers	Grants to individuals	4,126	5,616 (4,900)	16,450	92.383
Upper secondary pupil mobility	Grants to individuals	N/A (new)	2,316 (2,000)	6,691	15.498
Preparatory visits	Grants to individuals	1,000	1,361 (1,200)	20,885	28.416
<i>Total individual mobility</i>				<i>145,856</i>	<i>357.922</i>

The action consists of individual mobility grants for teachers and other school education staff, future language teachers and upper secondary pupils. Four different types of mobility are planned:

- 1) Teachers undertaking in-service training abroad. This type of mobility is currently available under Comenius 2.2.c. The duration of the training is from 1 to 4 weeks.
- 2) Future foreign language teachers acquiring work experience in a school abroad. This type of mobility is currently available under Comenius 2.2.b. The duration of the training period is from 3 to 8 months.
- 3) Upper secondary pupils following courses in another language in a school abroad. This new type of mobility responds to the increasing demand from schools to have the opportunity to send individual pupils abroad for longer periods. The duration of the periods abroad will be up to one school year.
- 4) Preparatory visits by school staff for the preparation of Comenius school partnerships. This type of mobility is currently available under Comenius 1. The duration of the visits is max. 1 week.

The grants are intended to support travel, accommodation and subsistence costs. Real costs of travel are covered (economy fare) and grantholders get a daily or monthly amount for accommodation and subsistence costs. For in-service training, course fees are also covered by the grant. The grant levels for mobility types 1, 2 and 4 have been calculated on the basis of the current average level of these grants, taking into account a need for revised grant amounts for accommodation and subsistence.

For the new type of pupil mobility, real costs of travel will be covered (economy fare) and a monthly amount will be granted for accommodation and subsistence.

School partnerships

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Comenius partnerships	Grants to individual participating schools	14,200	16,157 (14,200)	64,266	1,038.374

Target: To involve at least one pupil in twenty in joint educational activities during the period of the programme.

This action consists of activities developed jointly by several schools, including both local project activities in each school and various types of cross border mobility, including class exchanges, study visits and project meetings involving teachers and pupils. The standard duration of a partnership is 3 years. The funding consists of a lump-sum amount for local project activities per school of €4,000, plus a variable amount for cross border mobility. The total grant continues to average €14,200 for a 3-year project.

Erasmus

Student mobility

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Standard student mobility	Grants to individuals	1,050	1,755 (1,542)	1,721,262	3,021.161
Special student mobility	Grants to individuals	N/A (new)	11,404 (10,000)	77,834	887.647
Student placements in enterprises	Grants to individuals	2,200	3,024 (2,649)	210,318	635.977
<i>Total individual student mobility</i>				<i>2,009,414</i>	<i>4,544.784</i>
Intensive programmes	Grants to institutions	21,000	28,331 (25,002)	1,610	45.613

Target: To contribute to the achievement by 2011 of at least 3 million individual participants in student mobility under Erasmus and its predecessor programmes

The action consists of mobility of students and trainees for studies or training abroad in higher education institutions, as well as placements in enterprises, training centres or other organisations. Three different types of mobility are planned:

a) Standard mobility: this is the classical type of mobility which has existed since the programme's inception. The main conditions are: study periods of 3 to 12 months, full

recognition of studies and reintegration into the home university, waiver of tuition fees at the host institution, institutional agreements between sending and receiving institution.

b) Special mobility: this type of mobility is intended inter alia for students enrolled in Joint European Masters programmes. Conditions will be more flexible and individual grants amounts will be higher than in standard mobility.

c) Placements of students in undertakings: this type of mobility will be similar to placements under the current Leonardo programme. The placement duration will be up to 12 months.

The grants are intended to help support travel, accommodation and subsistence costs. Because of the increase in demand has been consistently outstripping the availability of resources, the standard student grant has remained at an average of around €150 per month since 1993. In real terms this represents a 25% cut in its value, and acts as an ever larger obstacle to participation of less-privileged students in the programme. The proposal is therefore to increase the average standard student grant to €250 per month by the end of the new programme.

The placement grant represents an average of some €500 per month for subsistence costs. It is higher than the standard mobility grant mainly because students on placements in enterprises do not normally have access to subsidised accommodation or services, and so have higher living costs. The new unit cost also provides for an increase in placement duration, in parallel with the increased duration envisaged for Leonardo placements (see below).

Intensive programmes are short-term mobility projects organised on a multilateral basis (eg 'summer schools'), based around a single host university. Courses must be taught by teachers and attended by students from at least 3 different countries. These courses therefore combine student and teacher mobility. The grant is a contribution towards the travel and subsistence costs of participating students and teachers and the organisation costs. The unit cost takes account of the need for revised amounts for accommodation and subsistence.

Teacher mobility

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Short term teacher mobility	Grants to individuals	600	1,028 (900)	279,513	287.397
Long term teacher mobility	Grants to individuals	N/A (new)	11,427 (10,000)	3,384	38.670
Mobility to undertakings	Grants to individuals	1,200	1,535 (1,348)	28,493	43.737
<i>Total teacher mobility</i>				303,390	359.804

This action consists of mobility of teaching staff in higher education institutions in order to teach or train in a partner institution abroad. Three types of mobility are planned:

a) Short term mobility for teaching: teaching periods of 1 to 6 weeks, similar to the current Erasmus TS mobility;

b) New long term mobility for teaching: teaching periods of minimum 1 semester and maximum 1 year - “Erasmus Sabbaticals”. These are full teaching and pedagogic programmes and combined with research ; preference will be given to teaching assignments which are part of integrated programmes leading to joint degrees but other types of teaching assignments will also be possible.

c) Mobility in co-operation with undertakings. This involves teaching staff of higher education institutions going for teaching assignments or periods of practical training in enterprises or training institutions for periods of 1 to 6 weeks.

The grants are intended to help support travel and subsistence costs. The experience with short-term mobility shows that too much financial effort is required from the sending institution to supplement the very low Erasmus grants, and that this is a serious obstacle to participation, so a substantial increase is proposed. The grant for long-term mobility has been calculated on the basis of an allowance of €1,200 per month.

Other staff mobility

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Other staff mobility	Grants to individuals	1,200	1,583 (1,400)	36,440	57.674

This action consists of mobility of other (non-teaching) staff in higher education institutions and staff of enterprises for purposes of training or teaching. Two broad types of mobility are planned : a) mobility of administrative or other non-teaching staff of higher education institutions for purposes of following practical training either in an enterprise or in another higher education institution ; b) mobility of staff of enterprises for purposes of transfer of knowledge or research results or for teaching. This includes in particular human resources managers, training planners and managers, trainers, occupational guidance specialists, managers, etc.

This action is a continuation and extension of the current “exchanges” action under the Leonardo da Vinci programme. The mobility periods will last between 1 and 6 weeks. The grants are intended to help support travel and subsistence costs. The average grant has been modestly increased to allow for revised accommodation and subsistence costs.

Organisation of mobility

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Organisation of mobility	Grants to institutions	9,300	29,988 (26,279)	17,500	524.795
Intensive language courses	Grants to institutions	6,000	8,119 (7,115)	2,555	20.745

The “Organisation of mobility” action consists of grants to the higher education institution or enterprises sending and/or receiving mobile students and teachers, to support the cost of

making the necessary provisions for high-quality mobility. These include: language courses, academic and organisational arrangements with partner institutions, including credit recognition and transfer arrangements, practical support for incoming students, etc. The grants will be modulated in proportion to the volume of mobility handled by the higher education institution or enterprise. The increase in the average unit cost reflects the additional workload for universities generated by the substantial increase in Erasmus student and teacher numbers.

Erasmus intensive language courses (EILC) are tailor-made for Erasmus students at the host country. The emphasis is on diversification of the offer of language training, with effort targeted on the less widely used languages. The purpose is to prepare the incoming students in the language of the host country. The grants to institutions are managed via the National Agencies and cover part of the organisation costs incurred by the institution. The students attending the course receive an extra month's grant. A moderate increase in unit cost is planned to reflect revised accommodation and subsistence costs.

Leonardo da Vinci

Trainee placements

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Trainee placements	Grants to individuals	1,950	3,644 (3,186)	721,772	2,630.123

Target: To increase placements in enterprises to at least 150,000 per year by the end of the programme

This action consists of placements of persons in vocational education and training (VET) in business sector or vocational training institutions abroad, and is funded through individual grants disbursed via mobility projects. The target groups of this action are: persons in initial vocational training, who undertake short placements in the framework of a training programme, and young workers (i.e. people who have completed their training or studies), who undertake longer-term placements in businesses. The purpose is to give the opportunity to people who enter the labour market to undertake an in-service training in another European country, thus improving their employability through experience of different work methodologies and approaches. The placements last between 3 and 52 weeks; the average duration is presently around 6 weeks for persons in IVT (average unit cost €1,250) and around 4 months for young workers (average unit cost €2,950) .

The grants are intended to help support travel, insurance (linked to the work-place such as civil liability, or accident), accommodation and subsistence costs. They also include the costs for pedagogical, linguistic and cultural preparation as well as for the management of the projects by the promoter. There is a demand for longer placements and for a broader opening of the programme to young workers. The intention is to increase the duration of the stays abroad by two months for both target groups, i.e. to 4 months in average for persons in IVT and to 6 months in average for young workers. It is anticipated that the share of total mobility represented by young workers will increase steadily during the new programme, thus raising the average unit cost too. These factors explain the increase of the average unit cost in relation to 2004.

As reinforcing the quality of Leonardo mobility remains one of the main objectives of the programme, it is also intended to take some further action to tackle some present weaknesses, such as for example allowing preparatory visits for project partners if needed, offering help in partner search in order to find partners of good quality abroad, some monetary compensation for the necessary tutoring and mentoring, especially for SMEs receiving young trainees on Leonardo placements.

Trainer mobility

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Mobility of trainers	Grants to individuals	1,200	1,584 (1,400)	132,000	209.057

This action consists of mobility of teaching staff in VET or of persons responsible for VET (including language training). It is organised in cooperation between training institutions and businesses with the objective of transfer of competencies and innovative methods and practices, sharing of knowledge and experience in different countries and organisational contexts. It applies to teaching and administrative staff responsible for human resources or vocational training planning, vocational guidance specialists (eg within learning providers or the business sector), and language trainers. Mobility lasts for between 1 and 6 weeks; the average duration is 2 weeks

The grants are intended to help support travel, accommodation and subsistence costs. Some 5-10% of the grant is available to support costs for preparation (if needed) and management costs. The unit cost is calculated on the basis of a daily subsistence allowance of 100 € per person plus the travel costs for an average 2-week stay, reflecting slightly increased accommodation and subsistence costs.

Projects for the development and transfer of innovation

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Transfer of innovation projects	Grants to institutions coordinating projects	320,000 (procedure B pilot projects)	281,893 (250,000)	2,500	704.733

These transnational cooperation projects aim to improve the quality of training systems through the development and transfer of innovation and good practice from elsewhere in Europe. They will involve learning providers, associations/institutions involved in VET, social partners, chambers of commerce, trade organisations, bodies providing guidance and counselling, research centres, NGOs, etc. Minimum participation will be 3 partners from different countries. Compared to the pilot projects currently funded under Leonardo da Vinci, the new type of project will have a smaller size. Following final selection decision by the Commission, grants will be awarded by National Agencies to the coordinating institution for the project, who will be responsible for distributing funds to the partners in accordance with an approved workplan and budget. The normal duration of these projects is 2-3 years. Grants

will cover the costs of development and adaptation of products, and they will include travel and meeting costs for the partners.

Grundtvig

Individual mobility

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Adult education staff mobility	Grants to individuals	1,000	2,281 (2,000)	20,540	46.858
Adult learner mobility	Grants to individuals	New	1,397 (1,200)	58,500	81.734
European Assistants	Grants to individuals	New	5,771 (5,000)	5,850	33.759
<i>Total Grundtvig mobility</i>				<i>84,890</i>	<i>162.351</i>

Target: To support the mobility of at least 25,000 individuals involved in adult education per year by 2013

Adult education staff mobility consists of grants to enable individual adult education staff of any category (1) to attend formal or non-formal, initial or further training activities, or (2) to carry out teaching or study visits to other European countries. Mobility periods can last up to one year, but the average duration is expected to be just over two weeks. The action is based on the current mobility scheme in Grundtvig. The increase in unit cost reflects the introduction of longer duration mobility and the reinforcement of language preparation where appropriate; it also includes provision for course fees, where payable.

Adult learner mobility is a new action consisting of grants to enable adult learners (singly or in groups) to visit another European country for various types of formal or non-formal adult education activities, including notably (1) European Study Circles (residential seminars bringing together adults as learners and informal teachers from several European countries); (2) European Adult Volunteer Scheme (opportunities for adults and in particular senior citizens to bring their experience to bear in contributing as learning facilitators to the further development of civil society in other European countries). The minimum duration is 1 week ; maximum 1 month. The unit cost assumes travel costs of €350 and subsistence costs for 9 days.

Grundtvig European Assistantships is a new action consisting of grants to enable young adult educators to undertake an assistantship in a formal or non-formal adult education organisation in another European country for the dual purpose of (1) developing the host institution's European dimension through assisting in the teaching of courses on languages/area studies, and (2) contributing to the assistant's professional development. They will cover young people having undergone or currently completing training and intending to have a professional involvement in adult education. The minimum duration is 3 months ; maximum 1 year. The unit cost is based on the assumption of travel costs of €300 plus a monthly grant of €700 for an average stay of 6.7 months.

Partnerships

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Grundtvig partnerships	Grants to individual participating organisations	8,000	11,351 (10,000)	19,214	218.101

Grundtvig partnerships are designed to encourage organisations involved in adult education, particularly at local level, to collaborate with partners in other European countries on (usually small-scale) projects addressing topics of mutual interest, thereby strengthening the European dimension of their work. Activities include joint meetings, seminars and fieldwork, exchanges of staff and learners, joint cultural events and exhibitions, and collaboration via ICT. They cover all types of organisations involved in providing or facilitating formal or non-formal learning opportunities for adults. Projects may last between 1 and 3 years, the average being 2.5 years. The grant is composed of a lump sum for basic activities plus a variable amount for visits, European courses, and exchanges of staff and learners within the partnership, depending on its specific profile of activities. The increase in unit cost reflects an increased number of adult educators being exchanged and the introduction of courses on Europe as an additional activity from 2009.

Transversal programme

Indirect centralised dissemination projects

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Dissemination projects	Grants to coordinating organisations	N/A (new)	112,504 (98,661)	350	39.376

These projects will focus on the transfer of products, results and good practice achieved under the Integrated Programme or its predecessors from one country or group of countries to another. Because the essence of the activity is the adaptation of existing products, results etc to function in a particular national context, such projects should most appropriately be managed through National Agencies rather than centrally. Projects normally will last 2-3 years. Grants will be distributed via the organisation coordinating the project and are expected to average EUR 10,000 per year per participant.

5.2.2. Commission procedure actions

This section focuses on the actions of the programme managed through the Commission procedure, which are characterised by their strong multilateral dimension and are generally larger-scale than the National Agency procedure actions, though far smaller in overall volume, representing some 18% of programme expenditure. Such actions will be administered by the Commission, which may delegate some management functions to the Executive Agency established for the purpose.

This section presents Commission procedure actions grouped by type, rather than organised by programme, in interests of legibility and because the structures and cost bases of each type of action are relatively homogeneous across all the programmes.

Multilateral projects

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Erasmus Curriculum Development & HEI/enterprise projects	Project grant		150.728 (132.280)	1,400	211.019
Comenius, Grundtvig, Policy, Language projects	Project grant		323,822 (286,213)	1,113	360.414
Policy, Language and innovation projects	Project grant		962,782 (854,542)	245	235.882
<i>Total projects</i>				2,758	807.315

(a) Smaller-scale Erasmus projects. These are

(i) Curriculum Development projects, based on the identical action in the existing Erasmus programme, where universities work together to produce either an entire new course or a module for incorporation in existing courses. Such projects will typically involve 5 to 10 higher education institutions and will last 2 or 3 years.

(ii) University/enterprise projects. These new projects are designed to fostering co-operation between higher education institutions and enterprises.

(iii) Multilateral projects aimed at innovation and experimentation in the other areas mentioned in the specific and operational objectives of the programme and the annual call for proposals. They will involve at least 3 higher education institutions, with a normal duration of 2 years.

(b) Medium-sized projects within Comenius, Leonardo and Grundtvig. These cover, for instance, joint projects between 4 or 5 institutions to update materials, methods or training used in the field of school or adult education; or projects bringing specialist language teaching institutions together to develop new language teaching or training materials. Such projects will typically involve between 5 and 10 partners and will last between 2 and 3 years.

(c) A smaller number of large projects, designed to promote innovation and experimental approaches in the different areas of the programme, including in the field of policy development at European level. These would include projects aimed at the creation, experimentation and testing of new tools and approaches with a high impact in the fields of vocational education and training or adult education; projects focusing on the creation and provision of online language courses, particularly in less widely used and less taught languages; etc. These projects will also last 2, 3 or more years, and will typically involve a significantly larger number of partners – some 25-30 on average.

Networks

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
“Standard” networks	Network grant		331,824 (294,047)	917	304.283
Erasmus Thematic Networks	Network grant	450,000	1,242,261 (1,090,221)	98	121.742
<i>Total networks</i>				<i>1,015</i>	<i>426.025</i>

This activity consists of Community support for European networks of organisations active in different sectors of education and training. The aim of such networks, which usually include members from every Member State, is to facilitate the exchange of practices among specialists and to foster reflection at European level on some key transversal issues in the field of education and training.

(a) “Standard” networks are found in Comenius, Leonardo, Grundtvig and in the transversal programmes. These large-scale networks, each in a given thematic area of importance, are designed to act as a forum for ongoing and needs analysis, to promote interaction between projects and partnerships, and to disseminate project outputs and good practice across Europe. As a general rule, all participating countries are represented in each network by the end of the work programme, but Comenius and Grundtvig networks can be smaller. This action also covers the Eurydice network, for the analysis of data relating to education in Europe, and the National Academic Recognition Centres (NARICs) which facilitate the recognition of higher education qualifications between countries.

(b) Erasmus “Thematic Networks”. These are very large-scale actions acting as think-tanks for opinion leaders from academia and society, representing a discipline or cross-disciplinary field of teaching and learning. They involve universities, other higher education institutions, research bodies, professional associations, employers, trade unions, international organisations, NGOs, independent experts and public authorities (including links with EU policies in the field concerned, like human rights, consumer protection, environment, etc.). Each Thematic Network project lasts three years and it involves institutions from all participating countries ; the average number of partners is 60. The increase in unit cost provides for an expansion of the number of partners and activities of thematic networks in response in particular to the Bologna process.

Observation, statistics, indicators

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Observation, statistics, etc	Grants and tenders		278,028 (246,684)	700	194.620

This activity comprises:

- (a) the collection and analysis of statistics and indicators in key policy areas, notably in the context of the Objectives Process following up the Lisbon goals, the operation of a languages indicator to measure progress towards the Barcelona objective of mother tongue + two languages, etc. The unit will vary according to the activity concerned, but may include market tenders for the collection and analysis of data, as well as grants for projects in the field.
- (b) support for studies in the field of education and training, focusing on areas of policy importance for the European Union. It builds on the existing studies actions of Socrates and Leonardo da Vinci.

Accompanying Measures

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Standard Accompanying Measures	Project grant		98,322 (86,323)	637	62.631
Other supporting activities	Project grant and tenders		154,369 (136,966)	994	153.443
<i>Total Accompanying Measures</i>				<i>1,631</i>	<i>216.074</i>

Standard Accompanying Measures consist of projects that are otherwise not eligible under the main actions of the programme, such as the organisation of conferences or seminars, the establishment of new European associations etc. The action carries forward the existing Accompanying Measures actions of the Socrates and Leonardo da Vinci programmes.

In addition, this heading covers support for Community initiatives such as Europass and Euroguidance and the maintenance of the Ploteus database, which are not covered elsewhere within the Integrated Programme, and a series of initiatives related to language learning, including the allocation of European Language Prizes, awareness-raising events organised jointly with national media, the operation of a European language indicator to measure progress towards the Barcelona objective, and an annual language conference.

Jean Monnet Programme

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
Jean Monnet Action	Project grant		39,813 (35,325)	2,051	81.656
Named European institutions	Operating grant	2,285,000	4,760,827 (4,213,120)	28	133.303
Other European institutions and associations	Operating grant		665,242 (590,253)	84	55.880
<i>Total Jean Monnet</i>				<i>2,163</i>	<i>270.840</i>

The Jean Monnet programme consists of three actions:

(a) The “Jean Monnet Action” itself, which supports networks and projects at university level to promote the teaching of, research into and reflection on European integration within higher education. In contrast to the remainder of the Integrated Programme, the Jean Monnet Action has worldwide coverage. The sub-actions include support for conferences and dialogue, for the establishment of Jean Monnet chairs, Jean Monnet Centres of Excellence and other teaching activities, for research networks, for national associations of university lecturers and researchers involved in European integration studies, and for networks of young researchers in the field.

(b) Community support for four European institutions in education and training: the College of Europe – Bruges and Natolin campuses; the European University Institute, Florence; the Academy of European Law, Trier; the European Institute of Public Administration, Maastricht. The increase in unit cost reflects the larger role anticipated for these institutions in the new programme period, and the establishment of a new graduate college at Florence.

(c) Community support for other European institutions and associations in education and training. This action will cover the award of some twelve operating grants per year to associations and institutions in the field, selected following an open call for proposals.

5.2.3. Programme-related operational activities

Cash prices (2004 prices in brackets)

Action	Unit	Unit cost 2004 (€)	Unit cost new programme (€)	Volume of realisations	Total cost (€mio)
National Agencies	Operating grant	245,720	822.343 (723,810)	525	431.730
Information & publications	Grants	New	19,447	1,750	34.033
Evaluation	Tenders	330,000	486.964 (428,571)	28	13.635
<i>Total operational</i>					<i>479.399</i>

This activity consists of essential programme-related operational activities, notably:

- 1) The allocation of operating grants to the National Agencies designated by the Member States to handle the indirect centralised actions of the new programme under the “National Agency procedure”. As set out in the draft Decision, this contribution may cover up to 50% of eligible costs of these agencies. The profile includes a rising unit cost across the seven-year period of the programme, reflecting the very substantial increase in the volume of activity with which the agencies will deal (in excess of 300% by 2013). The Commission assumes that the bulk of the increase in workload for the National Agencies will occur in Comenius, Leonardo da Vinci and Grundtvig, where an increase in volume will tend to result in a corresponding increase in the number of grant agreements. In the case of Erasmus, the volume-related increase in workload is likely to be more marginal since the majority of universities already participate in the programme (but the transfer of advanced vocational placements from Leonardo to Erasmus will represent a new area of activity for the agencies concerned).
- 2) Support for information and publications relating to the products and outcomes of the programme. This is complementary to the dissemination key action of the transversal programme, and will address the issue of lack of information about programme achievements and opportunities highlighted in the interim evaluations of Socrates and Leonardo da Vinci.
- 3) Funding for external evaluations of the Integrated Programme, which are an essential to fulfil the Commission’s monitoring and evaluation obligations as set out in the draft Decision. The increase in unit cost reflects the larger scale of the evaluation task for the proposed new programme, given the planned increase in its range of volume of activity.

5.3. Methods of implementation

Mobility, partnership and some project actions (82% of the programme budget) will be implemented by the Commission and National Agencies in the participating countries using the indirect centralised management model set out in the Financial Regulation.

The remaining 18% will be implemented centrally, either directly by the Commission and/or via an Executive Agency established for the purpose.

6. FINANCIAL IMPACT

6.1. Total financial impact on Part B - (over the entire programming period)

6.1.1. Financial intervention

Commitments (cash prices)

	2007	2008	2009	2010	2011	2012	2013	Total
Comenius	142.357	159.506	182.706	221.048	269.569	308.225	328.633	1,612.044
Erasmus	500.113	595.701	693.686	795.151	940.487	1,070.948	1,333.659	5,929.746
Leonardo	320.485	343.131	414.030	488.754	589.276	726.429	767.249	3,649.355
Grundtvig	48.285	50.658	67.459	83.449	98.557	114.237	130.504	593.149
Transversal	101.644	115.938	123.187	124.889	122.335	120.611	122.135	830.739
Jean Monnet	34.116	35.608	37.972	38.732	40.652	41.465	42.295	270.840
Operational	41.387	53.580	61.829	69.259	76.962	84.359	92.022	479.399
Total	1,188.387	1,354.122	1,580.870	1,821.283	2,137.838	2,466.274	2,816.497	13,365.271

6.1.2. *Technical and administrative assistance, support expenditure and IT expenditure (commitment appropriations)*

Commitments (cash prices)								
	2007	2008	2009	2010	2011	2012	2013	Total
1) Technical and administrative assistance								
a) Executive Agency	19.286	22.519	25.613	26.126	26.648	27.183	27.727	175.101
b) Other TAA:	0	0	0	0	0	0	0	0
- intra muros:								
- extra muros:								
Symmetry	1.248	1.273	1.299	1.325	1.351	1.378	1.406	9.282
Audits	0.787	0.802	0.818	0.835	0.851	0.868	0.886	5.847
Other informatics assistance	1.561	1.592	1.624	1.656	1.689	1.723	1.757	11.602
Experts – project evaluations	1.248	1.380	1.548	1.579	1.610	1.643	1.675	10.683
Subtotal 1	24.130	27.566	30.901	31.521	32.150	32.795	33.452	212.515
2) Support expenditure								
a) Studies	0.520	0.637	0.758	0.828	0.845	0.862	0.879	5.328
b) Meetings of experts	1.040	1.061	1.082	1.104	1.126	1.149	1.172	7.735
c) Information and publications	5.202	3.184	3.247	3.312	3.378	3.446	3.515	25.285
d) Other	0.520	0.531	0.541	0.552	0.563	0.574	0.586	3.867
Subtotal 2	7.283	5.412	5.629	5.796	5.912	6.031	6.151	42.214
TOTAL	31.413	32.978	36.530	37.317	38.062	38.826	39.603	254.729

These costs include the programme contribution to the operating costs of the proposed Education and Culture Executive Agency, in particular the personnel costs relating to this programme. These personnel costs correspond to 140 staff (secondments and temporary agents, and contractual staff) in 2007, and 186 staff in 2013. The increase in human resources across this period reflects the increase in the volume of activity to be managed by the Agency, corresponding to the planned increase in the volume of operational credits to be managed in the centralised (Commission procedure) actions of 200% by the end of the programme compared with 2006.

6.2. Calculation of costs by measure envisaged in Part B (over the entire programming period)

Commitments (cash prices)

Breakdown	Type of outputs (projects, files)	Number of outputs (total for years 2007-2013)	Average unit cost	Total cost (total for years 2007-2013)
Comenius				
In-service training for teachers	Individual mobility	101,829	2,176	221.625
Work-experience for future language teachers	Individual mobility	16,450	5,616	92.383
Upper secondary school pupil mobility	Individual mobility	6,691	2,316	15.498
Preparatory visits	Individual mobility	20,885	1,361	28.416
Partnerships	Project + mobility	64,266	16,157	1,038.374
Projects	Project	420	322,853	135.598
Networks	Project	126	538,088	67.799
Accompanying measures	Project	126	98,021	12.351
Total Comenius				1,612.044
Erasmus				
Intensive programmes	Project + mobility	1,610	28,331	45.613
Intensive language courses	Project + mobility	2,555	8,119	20.745
Standard student mobility	Individual mobility	1,721,262	1,750	3,021.161
Special student mobility	Individual mobility	77,834	11,372	887.647
Student placements	Individual mobility	210,318	3,015	635.977
Short-term teacher mobility	Individual mobility	279,513	1,025	287.397
Long-term teacher mobility	Individual mobility	3,384	11,394	38.670
Teacher mobility to undertakings	Individual mobility	28,493	1,531	43.737
Other staff mobility	Individual mobility	36,440	1,579	57.674
Organisation of mobility	Grant to organisers	17,500	29,988	524.795
Multilateral projects	Project	1,400	150,728	211.019
Thematic networks	Project	98	1,242,261	121.742
Accompanying measures	Project	224	149,871	33.571
Total Erasmus				5,929.746
Leonardo da Vinci				
Trainee placements	Individual mobility	721,772	3,644	2,630.123
Trainer mobility	Individual mobility	132,000	1,584	209.057
Innovation transfer projects	Project	2,500	281,893	704.733

Networks	Project	175	567,717	99.351
Accompanying measures	Project	105	58,007	6.091
Total Leonardo				3,649.355
<u>Grundtvig</u>				
European Assistantships	Individual mobility	5,850	5,771	33.759
Adult learner mobility	Individual mobility	58,500	1,397	81.734
Staff training mobility	Individual mobility	20,540	2,281	46.858
Learning partnerships	Project + mobility	11,351	19,214	218.101
Cooperation projects	Project	560	281,797	157.806
Innovation projects	Project	21	643,022	13.503
Networks	Project	56	549,435	30.768
Accompanying measures	Project	182	58,343	10.618
Total Grundtvig				593.149
<u>Transversal programme: KA1</u>				
ARION study visits	Individual mobility	17,578	1,352	23.774
Cedefop study visits	Individual mobility	17,578	1,352	23.774
Experimental projects	Project	49	416,210	20.394
Innovation projects	Project	21	1,109,892	23.308
Standing conferences	Project	35	665,935	23.308
Eurydice	Project	217	196,916	42.731
NARICS	Project	210	25,547	5.365
Statistics and indicators	Project	133	657,173	87.404
Studies and comparative research	Project	189	443,957	83.908
Accompanying Measures	Project	350	49,945	17.481
Databases	Project	21	138,737	2.913
Euroguidance	Project	210	92,491	19.423
Europass	Project	196	158,556	31.077
Total Key Activity 1				404.859
<u>Transversal programme: KA2</u>				
New language materials	Project	42	554,946	23.308
Online courses	Project	14	2,219,784	31.077
Training tools for language teachers	Project	42	554,946	23.308
Web portal	Project	7	416,210	2.913
Networks	Project	21	416,210	8.740
Awareness raising	Project	28	1,664,838	46.615
Competence tests	Project	7	2,497,257	17.481
Conferences	Project	7	416,210	2.913
European language label	Project	175	88,791	15.538
Total Key Activity 2				171.895
<u>Transversal programme: KA3</u>				
Multilateral projects	Project	140	840,101	117.614
Networks	Project	70	332,968	23.308
ICT development monitoring	Project	28	554,946	15.538
Total Key Activity 3				156.460
<u>Transversal programme: KA4</u>				
National projects	Project	350	112,504	39.376

Multilateral projects	Project	49	1,028,151	50.379
Studies	Project	350	22,198	7.769
Total Key Activity 4				97.525
Total Transversal programme				830.739
Jean Monnet programme: Jean Monnet Action				
Conferences and dialogue	Project	231	61,304	14.161
National Associations	Project	70	22,487	1.574
Research	Project	70	168,653	11.806
Teaching	Project	980	36,742	36.007
Young researchers	Project	700	22,487	15.741
Total Jean Monnet Action				79.289
Jean Monnet programme: Named institutions				
4 institutions	Operating grant	28	4,760,827	133.303
Jean Monnet programme: Other institutions and associations				
Institutions	Operating grant	35	1,124,352	39.352
Associations	Operating grant	49	337,306	16.528
Total other institutions and associations				55.880
Total Jean Monnet programme				270.840
Programme-related operational				479.399
TOTAL COST				13,365.271

The subtotals and overall total do not always sum because of rounding

7. IMPACT ON STAFF AND ADMINISTRATIVE EXPENDITURE

7.1. Impact on human resources

Types of post		Staff to be assigned to management of the action using existing and/or additional resources		Total	Description of tasks deriving from the action
		Number of permanent posts 2007 (2013)	Number of temporary posts 2007(2013)		
Officials or temporary staff	A	85.2 (97.6)	0	85.2 (97.6)	<i>Programme implementation</i>
	B	35.7 (40.0)	0	35.7 (40.0)	
	C	62.8 (70.4)	0	62.8 (70.4)	
Other human resources DNE/AUX			AUX A 2.2 (2.6) AUX B 17.6(20.8) AUX C 9.9 (11.7) DNE 17.6(20.8)	2.2 (2.6) 17.6 (20.8) 9.9 (11.7) 17.6 (20.8)	<i>Programme implementation</i>
Total		183.7 (208.0)	47.3 (55.9)	231.0 (263.9)	

7.2. Overall financial impact of human resources – 2004 prices

Type of human resources	Amount (€ million) 2007(2013)	Method of calculation
Officials	19.840 (22.464)	€ 108,000 * 183.7 (208.0) officials
Temporary staff		N/A
Other human resources (specify budget line)	0.238 (0.281) 1.901 (2.246) 1.069 (1.264) 0.792 (0.936)	A € 108,000 * 2.2 (2.6) staff B € 108,000 * 17.6 (20.8)staff C € 108,000 * 9.9 (11.7) staff DNE € 45,000 * 17.6 (20.8) staff
Total	23.836 (27.191)	

The amounts are total expenditure for twelve months.

7.3. Other administrative expenditure deriving from the action – 2004 prices

Budget line (number and heading)	Amount € million 2007(2013)	Method of calculation
Overall allocation (Title A7)		
A0701 – Missions	1.000 (1.000)	1,230 missions of up to 2 days at €650 + 200 missions of 1 week at €1,000
A07030 – Meetings	1.000 (2.000)	€1,160 per participant (€860 travel + €150 per diem * 2 days) = 860 participants
A07031 – Compulsory committees ¹	1.000 (1.000)	€860 per participant = 1,160 participants
A07032 – Non-compulsory committees	0	
A07040 – Conferences	0.500 (0.500)	
A0705 – Studies and consultations	0	
Other expenditure (specify)	0	
Information systems (A-5001/A-4300)		
Other expenditure - Part A (specify)		
Total	3.500 (4.500)	

The amounts are total expenditure for twelve months.

¹ Mixed advisory/management committee (Council Decision 199/468/EC Articles 3 and 4)

I.	Annual total (7.2 + 7.3)	€ 30.758 (average)
II.	Duration of action	7 years
III.	Total cost of action (I x II)	€ 215.303

The planned staff resources amount to an increase of 30% compared with 2006, when steady-state is reached in 2009, compared with an increase in operational credits to be managed through the centralised (Commission) procedure of 200% by the end of the programme. The

increase in staff resources also reflects the increased financial monitoring and verification demands resulting from the significant increase in resources managed through the National Agencies (in excess of 300% by the end of the programme).

The requirements for human and administrative resource expenditure will be met within the budget allocated to the Directorate General responsible within the context of the annual allocation procedure. The allocation of posts will depend in part on the internal organisation of the next Commission and in part on the result of a possible reallocation of posts between Commission services following the new financial perspectives.

8. FOLLOW-UP AND EVALUATION

8.1. Follow-up arrangements

The Commission has developed indicators for each specific and operational objective of the programme. These are set out in the annex to the extended impact assessment document.

Data collection will be assured through the National Agencies for the indirect centralised actions, and the necessary provisions shall be included in the grant agreements between the Commission and the National Agencies, and for the centralised actions directly by the Commission and by the Executive Agency.

For the purpose of data collection by all parties, a dedicated software application will be produced (based on the existing Symmetry system) and implemented concurrently with the start of the new programme.

8.2. Arrangements and schedule for the planned evaluation

An interim evaluation report on the results achieved and on the qualitative and quantitative aspects of implementation is scheduled for March 2011, based on reports from the participating countries. A final evaluation report will be produced by March 2016, likewise based on national reports.

9. ANTI-FRAUD MEASURES

The current proposal has been subject to the new pre-examination procedure with OLAF. It provides in particular that decisions of the Commission, agreements with the National Agencies and the resulting agreements and contracts should provide for monitoring and financial control by the Commission (or any authorised representative), including OLAF, and for audits by the Court of Auditors, which may be undertaken in situ as necessary. These controls may be undertaken in relation to the National Agencies and as appropriate in relation to beneficiaries of grants.