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THE COMMUNITY ACTION PROGRAMME IN THE FIELD OF EDUCATION SOCRATES

**GENERAL CALL FOR PROPOSALS 2005 (EAC/././.)
(Text with EEA relevance)**

(closing date for certain Actions is 1 November 2004)

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I. INTRODUCTION

I.1. The Socrates programme

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

In addition to the 25 Member States of the European Union, the programme is also open to participation by the EFTA-EEA countries¹ within the context of the Agreement on the European Economic Area, as well as the candidate countries². Applications may be submitted with regard to activities involving persons and institutions in all of these countries. Grants will be awarded in respect of participation of those countries which are not EU Member States provided that the relevant financial contributions of these countries are paid.

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

- **Comenius** seeks to enhance the quality and reinforce the European dimension of **school education** by encouraging transnational co-operation between schools, and institutions involved in teacher education. It promotes opportunities for education staff to undertake mobility during initial and / or in-service training, intercultural awareness, and language learning.
- **Erasmus** seeks to enhance the quality and reinforce the European dimension of **higher education**, by encouraging transnational co-operation between higher education institutions, promoting mobility for students and higher education teaching staff, and improving transparency and academic recognition of studies and qualifications throughout the Union.
- **Grundtvig** seeks to enhance the quality, European dimension, availability and accessibility of **lifelong learning** through **adult education** in the broadest sense, to promote improved educational opportunities for those leaving school without basic qualifications, and to encourage innovation through alternative learning pathways. In addition to learning within the formal educational system, this also includes learning that takes place on a non-formal, informal or autonomous basis.
- **Lingua**, for the **teaching and learning of languages**, supports the other Socrates Actions through measures designed to encourage and support linguistic diversity throughout the Union, to contribute to an improvement in the quality of language teaching and learning, and to promote access to lifelong language learning opportunities appropriate to each individual's needs.
- **Minerva** promotes European co-operation in the field of **Open and Distance Learning (ODL) and Information and Communication Technology (ICT) in education**. It does so by promoting a better understanding among teachers, learners, decision-makers and the public at large of the implications of ODL and ICT for education; by helping to ensure that pedagogical considerations are given proper weight in the development of ICT and multimedia-based educational products and services; and by promoting access to improved methods and educational resources in this field.

¹ Iceland, Liechtenstein and Norway.

² Bulgaria, Romania and Turkey.

³ For examples of projects funded under the centralised Actions of the Socrates programme please consult the ISOC database at: www.siu.no/ISOC

- **Observation and innovation in education systems and policies** contributes to improving the quality and transparency of education systems and furthering the process of educational innovation in Europe through the exchange of information and experience, the identification of good practice, the comparative analysis of education systems and policies, and the discussion and analysis of matters of common educational policy interest. Alongside other activities, this Action includes support for the **Eurydice** and **Naric** networks, and the **Arion** study visits.
- **Accompanying measures** supporting a range of initiatives that contribute to the overall objectives of the programme, by means of awareness-raising and information activities, dissemination and training activities, and activities undertaken by associations or non-governmental bodies.

Grants are also available to enable appropriate members of staff from eligible institutions to undertake **preparatory activities** in another participating country in order to lay the foundations for future projects or networks. Details of these grants are available from National Agencies (see Section VII), which will also provide information on any preparatory seminars that may be scheduled during the period covered by the present Call.

I.2. The role of the annual Call for Proposals under the Socrates programme

The **Socrates Guidelines for Applicants** (edition of June 2004), which are available at the addresses indicated in Section VI below, contain a full description of the Socrates programme, the target groups and the grants available under each of the programme's Actions. The **Socrates Guidelines for Applicants** contain the eligibility criteria as well as the main selection criteria and priorities of a more permanent nature.⁴ They are supplemented by annual Calls for Proposals, and also by specific Calls for Proposals relating to certain Actions within the programme.

The present annual **Call for Proposals 2005** sets out important additional information such as the closing dates for submitting applications (see Section V), specific annual priorities⁵ (see Section III), any modifications to the **Socrates Guidelines for Applicants**, and – following the entry into force of the new Financial Regulation applicable to all Community spending - a new set of exclusion criteria (see Section II) and financial rules (see Section IV.1). In the case of the Actions managed on a decentralised basis there might be national annual priorities applicable to specific countries only (see Section III.3).

The Socrates Guidelines for Applicants (edition June 2004) and the Call for Proposals 2005 should therefore be read in conjunction with one another. Together they contain all the information needed in order to apply for Socrates grants.

II. EXCLUSION CRITERIA

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

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

⁴ The term « priorities » used in this text corresponds to the term « award criteria » normally used in calls for proposals. As the **Socrates Guidelines for Applicants** and National Agencies use the term « priorities », the present **Call for Proposals 2005** does so, as well, for reasons of terminological consistency.

⁵ See footnote 3

- they are not bankrupt or being wound up, are not having their affairs administered by the courts, have not entered into an arrangement with creditors, have not suspended business activities, are not subject of proceedings concerning those matters, and are not in any analogous situation arising from a similar procedure provided for under national legislation or regulations;
- they have the professional competencies and qualifications required to complete the proposed project;
- they have not been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- they have not been convicted of an offence concerning their professional conduct by a judgement which has the force of *res judicata*;
- they have not been subject of a judgement which has the force of *res judicata* for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
- following a procurement procedure or another grant award procedure financed by the Community budget, they have not been declared to be in serious breach of contract for failure to comply with their contractual obligations;
- they have fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed.

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

III. ANNUAL PRIORITIES

The *Socrates Guidelines for Applicants* (see websites under Section VI below) set out the eligibility criteria and the main selection criteria and priorities of a more permanent nature that are applied when assessing requests for financial support within the programme. However, some **additional annual priorities**, which change from year to year, may also be defined.

Please note that the additional annual priorities set out in this Call for Proposals complement, but do not replace, the permanent priorities mentioned in the *Socrates Guidelines for Applicants*.

The additional annual priorities can be of a horizontal nature, covering all Actions of the Socrates programme (Section III.1. below), or they can apply to a specific Action within the programme only (Section III.2. below). In the case of decentralised Actions, national authorities can also identify national annual priorities applicable to specific countries only (Section III.3. below).

III.1. Annual horizontal priorities⁶

The additional horizontal priorities A-G set out below cover all Actions of the programme for the period covered by the present Call for Proposals. The political priorities of the year 2005

⁶ Full texts of the various documents referred to below can be found on the « Education and Culture » website of the Commission at http://europa.eu.int/comm/dgs/education_culture/index_en.htm

are the same as for 2004. Applicants under all Actions are invited to consider the messages given below in the development of their proposals.

A. Accession of new member states to the European Union (general European Commission priority)

On 1 May 2004 the European Union got 10 new Member States. Negotiations with Bulgaria and Romania continue. Given the fact that the new Member States already participate in Socrates, the programme is well placed to further strengthen links between the new EU-members / candidate countries and current EU members. It will be stressed in the various calls for proposals that there will be **positive discrimination** towards the accession / candidate countries in selecting and funding projects involving these countries. Since Turkey fully participates in the programme as from April 2004, it will receive the same treatment as the other candidate countries.

B. Sustainable development (general European Commission priority)

The European Commission will continue the promotion of sustainable development during the year 2005. The Socrates programme is therefore called upon to contribute to an economy based on the principles of sustainability and mutual solidarity and to generate projects in this field. It is important to note that the term « sustainable development » covers **economic, societal-cultural and environmental aspects** in a mutually reinforcing way. In this context and as the Lisbon summit underlined, it will also be stressed that the investment in human resources contributes to prosperity, economic and social cohesion as well as to a high life quality for the present and future generations.

C. Stability and security (general European Commission priority)

Stability and security can only be achieved, and racism and xenophobia successfully overcome, through the deepening of **intercultural dialogue** and co-operation. The European Union which is founded on a common set of values, has to take its responsibilities in this respect. This is why the European Commission has confirmed this issue as one of its political priorities for the year 2005. By its very nature, the Socrates programme can contribute to achieving a fruitful intercultural dialogue.

D. The future challenges to education and training systems and Lifelong learning

A joint “detailed work programme”⁷ of the European Commission and the Council, which aims at implementing the report on the “**Concrete future Objectives of education and training Systems**”⁸ was adopted by the Education Council in February 2002. A Council resolution on **lifelong learning** which followed the Commission’s 2001 Communication “Making a European Area of Lifelong Learning a Reality”⁹ was adopted in May 2002 and set out a wide range of follow-up actions. These policy initiatives are being implemented by means of the “Integrated Approach” focussing on eight thematic activities:

- teacher and trainer education;
- basic skills, foreign language teaching, entrepreneurship;
- information and communication technology (ICT) in education and training;
- increasing participation in maths and science;

⁷ 14/02/2002, Council 6365/02 EDUC 27

⁸ 12/02/2001, Council 5980/01 EDUC 18

⁹ COM(2001) 678 final

- resources and investment;
- mobility and European co-operation;
- open learning environment, active citizenship, inclusion;
- making learning attractive, strengthening links with working life and society.

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

E. Action Plan on Promoting Language Learning and Linguistic Diversity

The Commission adopted on 24 July 2003 the Action Plan 2004 – 2006 with a view to boosting language learning and linguistic diversity¹⁰. The Action Plan undertakes to make better use of existing education and training programmes to underpin a range of key objectives. Three broad areas for action have been identified: extending the benefits of lifelong language learning to all citizens, improving language teaching and creating a more language-friendly environment. The Socrates programme is the Commission's principal instrument for promoting language learning in all sectors of education..

F. eLearning

Following various initiatives for the integration and use of **information and communication technologies (ICT)** in the field of education, the European Commission adopted the eLearning Action Plan on 28 March 2001¹¹ which defines eLearning as "the use of new multimedia technologies and the Internet to improve the quality of learning, by facilitating access to resources and services as well as remote exchanges and collaboration". The eLearning Action Plan proposes Europe-wide measures to improve and develop new pedagogical methods and new organisations of learning so that all learners can fully benefit from the new learning possibilities offered by the new technologies. It mentions the contribution of Socrates explicitly, recalling that the use of ICT in education is a permanent horizontal priority for the programme as a whole.

III.2. Annual Action-specific priorities

Within the broad context provided above, the following **Action-specific priorities** will be applied to the General Call for Proposals 2005.

¹⁰ COM (2003) 449 final of 24 July 2003

¹¹ COM(2001) 172 final

COMENIUS – SCHOOL EDUCATION

Additional information on specific aspects of Comenius actions:

- **Comenius 1** (School partnerships): In relation to **Comenius Language Projects**, the minimum age for pupils to participate in a transnational class exchange is set at 12 years as of school year 2004/05 (against 14 years previously).
- **Comenius 2.1** (European co-operation projects for the training of school education staff) and **Comenius 3** (Comenius networks):

In addition to the overall Socrates priorities, the specific Comenius priorities for the year 2005 are the following:

Promoting good basic conditions for education enabling students to fulfil their potential by addressing all sorts of violence in school and by contributing to schools as safe and secure places for all students, teachers, and staff members.

Implementing the Action Plan on Promoting Language Learning and Linguistic Diversity (http://www.europa.eu.int/comm/education/doc/official/keydoc/actlang/act_lang_fr.pdf), notably through encouraging holistic school language policies, content and language integrated learning (CLIL) and innovative approaches to early foreign language teaching.

- **Comenius 3** (Comenius networks): Co-operation between Comenius networks and Erasmus and / or Grundtvig networks within the same thematic area or covering a number of closely related thematic areas is also encouraged.

ERASMUS – HIGHER EDUCATION

For all Erasmus activities, particular emphasis will be given to projects that:

- contribute to the realisation of the European Higher Education Area ("Bologna process"), aiming at greater compatibility and comparability of the systems of higher education and enhancing the attractiveness and competitiveness of European higher education institutions;
- Foster a substantial increase in student and staff mobility, for instance by combining public and private sources of funding;
- Develop integrated study programmes at bachelor, master and doctoral level, including the use of distance learning;
- promote the consistent use of ECTS, also for lifelong learning purposes, and the wider use of the Diploma Supplement;
- present links and synergies between Erasmus activities and projects supported by the Erasmus Mundus and Leonardo da Vinci programme and the Framework programme for Research and Technological Development.

ERASMUS 1: CURRICULUM DEVELOPMENT PROJECTS (CD)

Special attention will be given to:

- projects that aim at developing or revising "joint" programmes of study covering a complete degree cycle. After the development phase of one or two years, these programmes would be delivered by partner institutions in a genuinely integrated manner, involving student and staff mobility, joint delivery of parts of the course (intensive programmes), agreement on admission criteria, learning outcomes (competencies), assessment, quality assurance and recognition (use of the European Credit Transfer System (ECTS) / Diploma Supplement (DS)). The students would receive multiple or joint degrees, recognised by the participating institutions and countries. Joint programmes may concern first cycle (bachelor), second cycle (master) or third cycle (doctoral) studies. Special attention will be given to joint programmes at second cycle (master) level;
- projects that aim at mutual support in the development or revision of "single" programmes of study. In these projects, which do not focus on integrated delivery, partner institutions co-operate to develop programmes which fit the Bologna format and address educational and societal needs;

ERASMUS 1: INTENSIVE PROGRAMMES (IP)

Special attention will be given to projects that :

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

ERASMUS 2: STUDENT AND TEACHING STAFF MOBILITY

In 2005, the quality of the arrangements for mobility will be an important issue. Institutions will be requested to ensure high quality in organising student and staff mobility as detailed in the Erasmus University Charter. It is expected that this will also result in an increased volume of mobility.

Besides the general selection criteria, in the first half of 2005 national authorities may decide on certain priorities for the mobility of students and teaching staff, for instance subject areas, destination countries, etc. National Agencies can provide information on such priorities.

ERASMUS 3: THEMATIC NETWORKS

Special attention will be given to projects which:

- map and update the state of the art in their field (including rare fields of expertise in terms of knowledge, human resources and locations) and explore ways to foster more European cooperation;
- define and update generic and subject-specific competences using the method of the Pilot Project "Tuning Educational Structures in Europe",¹²

¹² www.relint.deusto.es/TuningProject/index.htm , www.let.rug.nl/TuningProject/index.htm

- promote synergies between teaching and research by encouraging universities to integrate research results in their teaching and link Socrates-Erasmus TNs with the networks funded by the Research DG;
- aim at study areas which are not addressed so far by projects in this Action (see the Europa website);

GRUNDTVIG – ADULT EDUCATION AND OTHER EDUCATIONAL PATHWAYS

Centralised Actions (GRUNDTVIG 1 and 4)

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

GRUNDTVIG 1: EUROPEAN COOPERATION PROJECTS

Priorities:

- Improving the initial and continuing training of adult education staff (in particular by means of Grundtvig Training Courses), and the quality of management of adult education establishments;
- Parental and family learning, learning in later life ;
- Teaching and learning of foreign languages, regional and minority languages, and the languages of migrants and ethnic minorities in adult education;
- Adult education for marginalised or disadvantaged citizens, notably prisoners and ex-offenders, refugees and asylum-seekers;
- Health education;

Attention is drawn to the **Dissemination Projects**, which will be a particular priority under the “General Projects” (see section 2 below) in 2005.

In 2005, two distinct types of project will be supported:

(1) Development of “Grundtvig Training Courses” for Adult Education Staff

The purpose of this new type of project is to improve the availability and quality of European training courses available to adult education teachers, managers or other adult education staff.

Projects will have a maximum duration of two years, consisting of three phases:

- developing / updating the course (normally during Year 1);
- testing the course with participants from the countries participating in the project itself, if possible in different countries and using various languages;
- organising the course on at least two occasions as an offering to Grundtvig 3 applicants Europe-wide. Travel and subsistence costs for the participants will be covered by Grundtvig 3 grants and do not need to be included in the Grundtvig 1 project proposal budget.

Projects will be expected to continue to offer the course for Grundtvig 3 applicants on at least two occasions following the end of funding for the project under Grundtvig 1, the costs being covered by the fees payable by Grundtvig 3 applicants. Projects demonstrating a potential for sustainability of the courses over a significant period of time, are particularly encouraged.

The salient feature of the courses to be developed by the projects is their “European dimension”, meaning that they are delivered by teams of trainers from at least three countries participating in Socrates and are open to participants from all ‘Socrates countries’.

The courses may address any aspect or theme of adult education, whether formal, non-formal or informal. They may be completely new courses or be based on existing courses, which are now to be given an additional European dimension.

There is no minimum or maximum duration of the courses, but it is expected that they will generally comprise at least 20-30 “teaching hours”, plus a day for observation visits to adult education institutions in the region where the course is held.

Applications from projects previously funded under Grundtvig (or the predecessor action for Adult Education under Socrates I, 1995-99) which now wish to disseminate their results by means of courses, will also be welcome.

Further advice on this new type of project, which was introduced in 2004 for the first time, is available from the Socrates / Grundtvig National Agencies on request. Applicants are encouraged to read the Information Note which accompanies the present Call and is also obtainable from the Technical Assistance Office and National Agencies (see below).

(2) General projects

Projects under this rubric seek to enhance the quality and / or European dimension of adult education by other means than training courses for adult education staff, notably by:

- **Improving the content and delivery of adult education.**
- **Improving adult education at a system / policy level.**
- **Improving the accessibility of learning opportunities for adults.**
- **Improving the management of adult learning.**

Proposals in this category (“General Projects”) will be expected to:

- demonstrate an awareness of the results of previously funded Grundtvig / Socrates (Adult Education) projects in the chosen thematic area (Compendia of previously supported projects can be found at the Grundtvig website below);
- describe, against this background, the added value of the proposed new project;
- show that the project will give rise to clearly identifiable outcomes / results which will lend themselves to wider dissemination across Europe.

Funding will be approved for up to three years. However, the final 6-12 months of each project will be devoted to dissemination activities, within the countries represented in the project partnership (and if possible beyond). This should be reflected in the work programme which forms part of the project’s application for support.

>> Dissemination projects

In 2005, general Cooperation Projects designed specifically to help **disseminate and valorise** the results generated by projects previously funded under Grundtvig, whether or not these involved the same organisations as those participating in the Dissemination Project, will be particularly encouraged. Applicants are encouraged to read the Information Note

which accompanies the present Call and is also obtainable from the Technical Assistance Office and National Agencies (see below).

GRUNDTVIG 4: GRUNDTVIG NETWORKS AND THEMATIC SEMINARS

In 2005, two distinct types of grants will be awarded:

(1) Grundtvig Network grants

A small number of networks will be supported, each of which will involve at least 10 countries participating in Socrates. The priorities for new Networks in 2005 will be as follows:

- **methods of financing** adult education (effective models for funding and cost-sharing at national, regional or local level, including public-private initiatives);
- valuing non-formal and informal learning;
- adult learning opportunities for the **disabled**;
- adult learning opportunities through **sport**;
- **mathematics and science** education for adults.

In addition, the Commission will consider applications for the co-funding of new work programmes of existing Grundtvig Networks whose grant agreements come to an end in 2004, in the light of the proven performance of the Networks concerned.

In order to be selected, Grundtvig 4 networks should in particular:

- be geographically broad-based and inclusive;
- be composed of strong and representative organisations / institutions (genuine multiplier function);
- be active in forging co-operation between Grundtvig projects in the thematic area concerned.

Particular attention is drawn to the need for the networks to play a proactive role in **strengthening synergy and collaboration between Grundtvig projects** working in the same field or theme, and the dissemination of their results. To this end, strong priority will be given to proposals relating to Grundtvig networks which include in their work programme a clear reference to the **strategy and specific activities** they intend to develop for this “**thematic clustering**” of projects, such as thematic conferences, seminars and workshops.

The Commission will not support more than one Network in a given thematic area. Applicants should therefore consult the Compendium of existing Grundtvig 4 Networks at the Grundtvig website below.

Applicants are encouraged to read the Information Note which accompanies the present Call. It is also obtainable from the Technical Assistance Office and National Agencies (see address below).

(2) Grundtvig Thematic Seminars

Under this new heading, one-year grants will be made available to help pave the way towards the creation of Grundtvig 4 networks in thematic areas where such a network does not currently exist.

The grants will support the organisation of seminars, workshops or other events (“Grundtvig thematic seminars”) designed to help ‘valorise’ and disseminate the results generated (and

methodologies used) in particular by projects previously supported under Grundtvig 1 and 2 or the adult education action within Socrates I, but also other innovative experiments on the theme in question funded from other sources. There is no minimum or maximum duration of the seminars, but it is expected that they will generally last around three days.

To be eligible for support, the partnership submitting the application for support must contain organisations from at least three countries eligible to participate in Socrates, one of which must be an EU Member State. Each seminar will bring together representatives of organisations involved in previous Grundtvig projects or other experiments / pilot schemes from as many 'Socrates countries' as possible.

Each grant is expected to give rise to a proposal, either from the same partnership or other organisations participating in the Grundtvig Thematic Seminar, to create a full Grundtvig Network in the field concerned.

Each proposal may relate to one thematic area only. If a partnership wishes to apply for support to organise a Grundtvig Thematic Seminar in more than one thematic area, a separate proposal must be submitted for each of these areas.

A proposal may envisage organising more than one seminar in the thematic area chosen. Even in these cases, however, the grant will not surpass the maximum amount indicated above.

The grant is designed to help cover the organisation of the seminars, the travel and subsistence costs of the partner organisations' representatives at the seminars, and any fees, travel and subsistence costs of additional experts. The travel and subsistence costs of the main body of participants will be covered either through the Grundtvig 1 grants awarded to the projects in question or, where such funding has ended, individual grants awarded via the Grundtvig National Agencies.

Partnerships submitting a proposal must demonstrate that they are acquainted with the projects so far supported by Grundtvig and Socrates I Adult education in the thematic area chosen for the seminar(s). They should therefore consult the compendia of projects available at the Grundtvig website below.

In selecting the proposals for support, the Commission will take into account, in addition to the selection criteria set out in the *Socrates Guidelines for Applicants*, the extent to which the proposed Grundtvig Thematic Seminar(s) appear(s) likely to:

- give rise to a proposal for a Grundtvig 4 Network of good quality within a clear timeframe (normally by the closing date for Grundtvig 4 pre-proposals relating to 2007 – subject to the availability of this closing date under the programme arrangements which will replace Socrates from 2007);
- contribute significantly to the valorisation / dissemination of project results and methodologies in the thematic field concerned.

Decentralised Actions (GRUNDTVIG 2 and 3)

- Particular priority will be given to Grundtvig 2 Learning Partnerships with strong involvement of adult learners and which show a clear potential to become a vehicle for the exchange and dissemination of good practice and experience.
- As in 2004, the minimum duration of one week for Grundtvig 3 training activities, mentioned in the *Socrates Guidelines for Applicants*, will no longer apply in 2005.

As regards individual mobility grants, National Agencies will give particular attention in 2005 to persons wishing to participate in the new activities contained in the present Call for Proposals, namely the Grundtvig Training Courses under Grundtvig 1 and Grundtvig Thematic Seminars under Grundtvig 4.

Persons interested in applying for grants under Grundtvig 2 and 3 are strongly encouraged to contact the National Agency in their respective country, in order to receive further advice.

Further information

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

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

LINGUA – LANGUAGE TEACHING AND LEARNING

Applicants are advised to consult the “Lingua Community” webpage at:

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

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

Applicants for Lingua 2 may also consult the Lingua Catalogue at:

http://europa.eu.int/comm/education/socrates/lingua/catalogue/home_en.htm

LINGUA 1: PROMOTION OF LANGUAGE LEARNING

The European Commission encourages the full participation in the Action of eligible organisations capable of motivating a mass audience to learn foreign languages (such as university or other language centres, TV, radio and media companies, cultural organisations, sports associations, etc.).

Particular priority will be given to projects:

- improving opportunities and access to resources for people with little or no experience of language learning;
- promoting languages at places frequented by the general public (exhibitions, sporting, cultural or gastronomic events, festivals, tourist attractions, airports, shopping centres, etc.);
- disseminating information about successful practices in the above fields to other institutions and key decision-takers across Europe.

LINGUA 2: DEVELOPMENT OF TOOLS AND MATERIALS

Particular priority will be given to projects in line with the objectives of the Action Plan on Promoting Language Learning and Linguistic Diversity, namely :

- projects to develop materials for teaching language awareness and foreign languages, notably the less widely used and less taught official Community languages, to primary and pre-primary learners.

projects for the development and dissemination of new, specific methodologies for teaching subjects through languages, notably the less widely used and less taught official Community languages.

Other priorities are:

- Projects promoting multilingual comprehension.
- Projects encouraging the use of ICT in learning languages materials.

Please note:

- Projects targeting the shortages of materials for the teaching and learning of languages for specific vocational purposes must be presented under the Leonardo da Vinci programme and not under Lingua.
- Dictionaries and data bases are not considered in themselves to be language learning tools, and therefore their production does not fall within the scope of this Action.
- Projects where the development of a website is an important feature will need to demonstrate how it will continue to be maintained and managed after the end of the contractual period with the Commission.
- The teaching of a national language of a given country in its own territory (for instance to members of an immigrant community) is considered to be the teaching of a second language, and not of a foreign language, and therefore it is not eligible for funding in Lingua.
- As a general rule, no funding will be given to projects which aim at developing further or continuing on-going Lingua 2 projects, before the original project has been completed and its final results evaluated by the European Commission.

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

Minerva is the key Action for the implementation of the eLearning Action Plan (see above). In this context, special efforts will be made by the European Commission, in co-operation with the Member States, to promote a critical and responsible use of technology in learning. Minerva also aims at creating a favourable environment for European learners by developing infrastructures, services and contents for a relevant use of technology in learning at all levels, from early learning to the learning needs of older generations.

Outside the general priorities, special attention will be given to the projects focusing on the use of ICT in the educational process, in the following contexts :

- The creation and the organisation of public services offering guidance in innovation to support educational personnel at all levels, as well as public services in support to teachers, students and pupils ;
- The pupils who have specific needs, notably the ones who are at risk of being 'early school leavers';
- Approaches aiming at improving attractiveness of learning and the quality of pedagogical relations through new media;
- Pupil-centred approaches, more precisely in the framework of guidance, tutoring and 'learning communities';
- Education and training prospective and the development of in-depth reflexions on the role of ICT in learning processes.

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

Evaluation and dissemination must also be considered as key components of the proposed projects, as they are essential for ensuring the transferability of the projects’ outcomes in the given field. Evaluation frameworks should aim at clarifying the parameters of success or failure in the context of the project. They should ensure that experience gathered during the project is properly identified, analysed with a view to lessons to be learnt, and possibly transferred to other European contexts. Dissemination frameworks should clarify the scope and format of envisaged products, services and outcomes, within and beyond the partnership, notably with respect to languages and to the size and nature of target groups concerned.

OBSERVATION AND INNOVATION

The **studies, analyses** and other activities relating to the observation of educational systems and policies (Socrates Action 6.1 and 6.2) will be subject to a specific Call for Proposals, to be published in the fourth term of the year 2004, details of which are available at the addresses indicated in Section VI below. The priority themes will be closely related to the current political agenda of the European Union in the field of education and especially the « Detailed Work programme on the follow-up of the Objectives of education and training systems in Europe » (see Section III.1.D).

As regards **Arion** study visits, the themes will be more specifically linked to the key issues and topics for exchange of the “Objectives report” mentioned above. The detailed list of themes will be drawn to the applicants’ attention by National Agencies along with the Arion programme announcement and the publication of the study visit catalogue in January 2005.

ACCOMPANYING MEASURES

Accompanying measures play an important role within and between the Actions of the Socrates programme. No specific priorities will be established for Action 8 (Accompanying Measures) in 2005 because of the general nature of this Action which is described in detail in the *Socrates Guidelines for Applicants*.

PROJECT CLUSTERING FOR COMENIUS, GRUNDTVIG AND MINERVA

The Commission proposes to continue the process of project clustering within and across the “big” Actions Comenius, Grundtvig and Minerva around major and recurring project themes. While some themes are Action-specific, others are horizontal, such as basic skills, inclusion, active citizenship, language teaching and learning, intercultural education / migrants, maths and science, quality of education and quality assurance, ICT in school and adult education, as well as themes of foreign languages and arts and culture.

The idea behind the clustering of projects is to enable projects covering the same theme to co-operate rather than let them work in a stand-alone environment. This will create useful synergies, exchange of experience, mutual learning and profound exploration of the subject matter; and it will prevent parallel exercises with no contact points between similar projects.

Comenius and Grundtvig will especially use their network Actions as the main clustering tools, while Minerva will explicitly call for a limited number of clustering projects within the Action.

The project clustering began as a pilot operation in the year 2003/2004 limited to the three actions mentioned and will be continued during 2005/2006. Depending on the outcome, the operation may be extended to further actions.

III.3. Annual national priorities for decentralised Actions

The national authorities of the participating countries listed below will apply additional national priorities for the selection of **decentralised** projects. These national priorities are complementary to the general European priorities mentioned in the previous chapters of this Call.

IV. FINANCIAL SUPPORT

IV.1. General rules

Co-financing principle

The Socrates decision states in Annex IV.B.2 that: “As a general rule, Community financial assistance granted for projects under this programme is intended to offset the estimated cost necessary to carry out the activities concerned and may cover a maximum period of three years, subject to a periodic review of progress achieved. In accordance with the co-financing principle, the beneficiary's contribution may take the form of the provision of the personnel and / or infrastructure necessary for the realisation of the project”. Participating institutions / organisations are therefore expected to respect this co-financing principle.

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

Applications- Selection Criteria

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

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

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

- A copy of the profit and loss and the balance sheet of the coordinator for the last 3 financial years for which the accounts have been closed. These documents must be provided in one of the official EU languages. This requirement is waived for public bodies.
- A copy of the legally registered statutes or articles of association as well as a copy of the official registration certificate of the applicant organisation. These documents must be provided in one of the official EU languages.
- Declaration on their honour from applicant organisations, completed and signed, certifying that they exist as a legal person and have the financial and operational capacity to complete the proposed actions.
- CVs of the key persons in the partnership, giving details of relevant professional experience.
- The bank details form completed by the applicant and certified by the bank (original signatures as required). This account or sub-account must make it possible to identify funds paid by the Commission. This account must be held in one of the countries participating in the programme.
- For proposals for which the requested grant amount exceeds € 300,000, the application form must be accompanied by an external audit produced by a certified auditor. This report shall certify the accounts for the last available financial year and give an assessment of the financial viability of the applicant organisation. This requirement is waived for public bodies, secondary and higher education establishments and international organisations (as referred to in art. 43 of the Financial Regulation).

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

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

Award Criteria

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

The grant may not have the purpose or effect of producing a profit for the beneficiary. Grants may not be cumulative or awarded retrospectively.

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

Grant agreements

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

Payments

Payment shall be made upon proof that the relevant project has been carried out in accordance with the provisions of the grant agreement. The grant amount can be paid through pre-financing, interim payments and payments of the balance. If, under exceptional circumstances, the European Commission or National Agencies pre-finance more than 80% of the project, the Commission or National Agency requires the beneficiary to lodge a bank guarantee in advance, unless the beneficiary is a public-sector body¹³. If the total of pre-financing and interim payments exceeds 750,000 Euro per financial year and per agreement or if a balance payment exceeds 150,000 Euro, an external audit report will be requested from the beneficiary, unless the beneficiary is a public-sector body.

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

IV.2. Possible level of grants

The budget available for the Socrates programme in 2005 amounts to about € 361 million (enlarged EU 25). The *Socrates Guidelines for Applicants* provide information on the financial support available within the programme, where the amount of support provided is likely to remain stable. Generally speaking, the level of grants awarded is likely to vary considerably, depending on the type of project, the number of countries involved and so on.

¹³ Comenius Language Assistants are exempt from this requirement

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

Action	Deadline(s)	Activity Period
COMENIUS		
School partnerships	1 February 2005	Start 1 August 2005
Expression of interest to receive a Comenius Language Assistant	1 February 2005	Start 1 August 2005
European co-operation projects for the training of school education staff	1 March 2005	Start 1 October 2005
Individual training grants for school education staff: - grants for initial training - grants for language assistants - grants for in-service training	Contact NA	Contact NA
Comenius Networks	1 November 2004	Start 1 October 2005
ERASMUS		
Erasmus University Charter	1 November 2004	Start 1 July 2005
Curriculum Development projects	1 March 2005	Start 1 October 2005
Intensive Programmes	1 March 2005	Start 1 October 2005
Mobility of students and teaching staff	Contact home university	Contact home university
Thematic networks	1 November 2004	Start 1 October 2005
GRUNDTVIG		
European co-operation projects	1 November 2004	Start 1 October 2005
Learning partnerships	1 March 2005	Start 1 August 2005
Expression of interest to receive a Comenius Language Assistant	1 March 2005 ¹	Start 1 August 2005
Individual training grants for adult education staff	Contact NA	Contact NA
Grundtvig Networks and Thematic Seminars	1 November 2004	Start 1 October 2005
LINGUA		
Promotion of language learning	1 November 2004	Start 1 October 2005
Development of tools and materials	1 November 2004	Start 1 October 2005
MINERVA		
Open and distance learning / Information & Communication Technology in education	1 November 2004	Start 1 October 2005
OBSERVATION AND INNOVATION		
General observation activities	Contact Commission	Contact Commission
Arion study visits for education decision-makers	1 June 2005 ¹⁴	Start 1 September 2005
Arion multiplier activities	Contact Commission	Contact Commission
Innovatory initiatives responding to emerging needs	Contact Commission	Contact Commission
JOINT ACTIONS		

ACCOMPANYING MEASURES		
Accompanying measures	1 April 2005	Start 1 September 2005
	1 October 2005	Start 1 March 2006
PREPARATORY VISITS		
Preparatory visits for all Actions	Contact NA	Contact NA

¹⁴ In some countries earlier deadlines apply. Applicants are invited to contact their National Agencies for details.

VI. APPLICATION AND SELECTION PROCEDURES

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

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

- from the National Agencies for the programme, the list of which appears in *Socrates Guidelines for Applicants* and at the central website for Socrates below;
- from the central website for Socrates at:
<http://europa.eu.int/comm/education/socrates.html>
- from the Socrates, Leonardo and Youth Technical Assistance Office (TAO), rue de Trèves / Trierstraat 59-61, B-1000 Brussels, Tel: (32-2) 233 01 11, fax: (32-2) 233 01 50, e-mail: info@socrates-youth.be, which provides the European Commission (Directorate-General for Education and Culture) with technical assistance in implementing the programme.

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

Applicants will be informed of the result of the selection procedures in writing. The Commission and the National Agencies will endeavour to ensure that the selection decisions are made known to applicants at the latest five months after the closing date for submission of project applications. For centralised projects selected in accordance with the two-phase procedure, this will only refer to the second stage of the selection (full project proposals).

Except in the case of grants allocated to individuals, the Commission and the National Agencies will publish the names and addresses of beneficiaries, the grant amount, the financing rate (when applicable) and the object of the grant on the appropriate website.