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Date of Postmark

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SOCRATES PROGRAMME

Application Form for Full Proposals

- GRUNDTVIG 1:** (EUROPEAN COOPERATION PROJECTS)
- GRUNDTVIG 1.1:** (GRUNDTVIG TRAINING COURSES)
- GRUNDTVIG 1.2:** (GRUNDTVIG DISSEMINATION PROJECTS)

- -1-2005-1- - -

CLOSING DATE FOR SUBMISSION: 1 MARCH 2005 (as per postmark)

Applications bearing a postmark after this date will not be considered.
Applications must be sent by post. Applications sent by fax or e-mail will not be accepted.

You must send the following:

- (1) the original application bearing the original signature of the legal representative of the coordinating institution
- (2) 4 copies of this application
- (3) A diskette containing:
 - a copy of this application in MS Word format
 - the project/network summary in DE, EN or FR.

Socrates, Leonardo and Youth Technical Assistance Office
Rue Colonel Bourg 139 Kolonel Bourgstraat
B-1140 Brussels

Important instructions and information regarding the application and selection procedure

- Before completing the form, please read the relevant sections in the *SOCRATES Guidelines for Applicants* and the *SOCRATES General Call for Proposals 2005*, which contain additional information on closing dates and specific priorities for that year. Please also read the most recent edition of the *Administrative and Financial Handbook for Applicants for Transnational Cooperation Projects* before completing Section 2 on the budget. All of these documents can be obtained from the Socrates, Leonardo and Youth Technical Assistance Office at the address below. Further information can also be found on the SOCRATES website:
<http://europa.eu.int/comm/education/socrates.html>
- The Commission is required - in accordance with Article 176 of the Financial Regulation applicable to the general budget of the European Communities (Council Regulation No 1605/2002 of 25 June 2002) - to verify the **financial capacity** of beneficiaries. The verification of financial capacity shall not apply to natural persons in receipt of scholarships, public bodies or international organisations referred to in article 43 of financial Regulation. Public body in that sense means, that it is either guaranteed by the state (for example, public authorities are required to cover any losses it may make) or it is legally incapable of bankruptcy or its income is fixed by law (documentation required). **The applying organisation is requested to supply a copy of the following documents:** The profit and loss accounts and the balance sheet for the last financial year for which the accounts have been closed.
- Projects which are awarded grants of 300.000 euros and above will be requested to submit an external audit report produced by an approved auditor, unless the applicant is a public body or a secondary or a higher education establishment. The external audit report will certify the accounts for the last financial year available and give an assessment of the financial viability of the applicant.
- The Commission is required to proof the legal status of the applying organisation (legally registered statutes, articles of association, official registration certificate or other document of equal legal value, as applicable) – see Annex 4.
- The form must be completed in one of the 20 official languages of the European Union. These are marked with an asterisk (*) in Annex 1. Please note that all participating institutions must confirm in writing their agreement to the application as submitted. It is therefore suggested to use as application language a language which is common to the partnership.
- The application must be typewritten or word-processed using a computer, character size 11 pt minimum.
- The original of the application must bear the original signature of the person legally authorised to sign on behalf of the coordinating institution and the original stamp of this institution, if it has one.
- A diskette containing two MS Word files – a project/network summary in DE, EN or FR and a copy of the original application – must be provided in the same envelope as the original paper version.
- A copy of the application must be sent by 1 March 2005 to the appropriate National Agency in each of the countries which are participating in the project (in case of Lingua I, II; Grundtvig I, I.1, I.2; Comenius II.1 and Minerva). The copy must be accompanied by a translation of Section 1 Point 2 and Section 4 of the form, if this is requested by the National Agencies concerned. The list of National Agencies appears in the *General Call for Proposals 2005*. It is also available from the above-mentioned website and from the Socrates, Leonardo and Youth Technical Assistance Office at the address below.
- All applications will be acknowledged.
- Applications will be judged against the eligibility and quality criteria set out in the *Guidelines for Applicants* and the *General Call for Proposals 2005*.
- Applicants will be notified about the outcome of the selection in writing in late July 2005. A copy of the notification letter will be sent to the National Agencies concerned.

- In accordance with standard Commission practice, the information provided in your application may be used for the purposes of evaluating the SOCRATES programme. The relevant data protection regulations will be respected.

Any questions relating to this proposal should be addressed to the

Socrates, Leonardo & Youth Technical Assistance Office

Rue Colonel Bourg 139 Kolonel Bourgstraat

B-1140 Brussels

Telephone: + 32 2 233 0111

Fax: + 32 2 233 0150

e-mail: info@socleoyouth.be

SECTION 1 - IDENTIFICATION

1. Project/Network title

Please use a maximum of 12 words; start with an acronym or abbreviation, if applicable.

If necessary, please provide a translation either in EN, FR or DE of the project/network title.

2. Summary of the project/network

Please identify clearly, in a maximum of 200 words, the following aspects of your project/network: Objectives, Target groups, Main activities and Expected outputs.

If your application is successful, this summary will be used as the description of your project/network and will therefore be part of your contract.

Applies only for ERASMUS:

Please identify how the project contributes to the aims and priorities described in the European Policy Statement (EPS) of your institution. If possible, please provide the same information with regard to partner institutions and the EPSs submitted with their applications for the Erasmus University Charter.

3. Duration and languages

Please indicate the total duration for which you are applying for a grant. The contractual period is likely to start on 1/10/2005.

Duration
<input type="checkbox"/> 12 months <input type="checkbox"/> 24 months <input type="checkbox"/> 36 months
Language in which you would like the grant contract to be issued and in which you will correspond with the Commission
<input type="checkbox"/> DE <input type="checkbox"/> EN <input type="checkbox"/> FR
Language into which you would like a translation of the contractual package
<input type="checkbox"/> DE <input type="checkbox"/> EN <input type="checkbox"/> ES <input type="checkbox"/> FR <input type="checkbox"/> IT

4. Financial support from the European Community

Please note that according to the new financial regulation applicable to the general budget of the European Communities, **one project/network may not receive more than one grant from the budget of the European Communities to any one beneficiary**. In other words, if you are to be selected to receive a Socrates grant for a given project/network, you must not receive a grant from another Community programme for the same project/network and funding period.

Has the proposal, or any aspect thereof or any larger project/network to which it may belong, already been supported in the past by the European Community?

- No
- Yes. *Please specify the programme, date, type of activity (e.g. preparatory visit) and, if possible, contract number(s):*

Is this proposal, or any aspect thereof or any larger project/network to which it may belong, currently being supported under the SOCRATES Programme or some other European Community programme?

- No
- Yes. *Please specify the programme, date, type of activity (e.g. preparatory visit) and, if possible, contract number(s):*

Is this proposal, or any aspect thereof or any larger project/network to which it may belong, currently the subject of any other application for support from the European Community?

- No
- Yes. *Please specify the programme(s) and provide details under Section 2 Table 2.*

5. Applicant Organisation (= Participating institution No 1)

To fill in this part, please use the type of institution codes, country codes and region codes indicated in Annex 1.

5.1 Identification of the institution

Full legal name of the institution in the national language			
Acronym of the institution, if applicable			
Full name of the institution in English (formal or informal translation)			
Type of institution code		Erasmus ID code, for Higher Education Institutions only	
Website	http://		
Is the institution able to recover VAT?	Yes <input type="checkbox"/> No <input type="checkbox"/>		

5.2 Legal representative¹ and legal address of the organisation

Title (optional)(e.g. Mr, Mrs, Prof., Dr, etc.)			
Family name :		First name :	
Department/Unit			
Official function within the institution			
Legal Address of the institution			
Street		street number	
Postcode		Town / City	
Country code		Region code	
Telephone (including country and area code)	(+)	Fax (including country and area code)	(+)
E-mail	@		

5.3 Project/network Coordinator

<u>This section needs to be filled in ONLY if the coordinator's organisation is different from the Applicant organisation above</u>			
Full legal name of the institution in the national language			
Acronym of the institution, if applicable			
Full name of the institution in English (formal or informal translation)			
Type of institution code		Erasmus ID code, for Higher Education Institutions only	
Website	http://		
Is the institution able to recover VAT?	Yes <input type="checkbox"/> No <input type="checkbox"/>		

¹ This is the person entitled to sign the grant agreement.

Name and Contact Address of the coordinator² (this section must be completed in all cases)

Title (optional)(e.g. Mr, Mrs, Prof., Dr, etc.)			
Family name :		First name :	
Department/Unit			
Official function within the institution			
Street		street number	
Postcode		Town / City	
Country code		Region code	
Telephone (including country and area code)	(+)	Fax (including country and area code)	(+)
E-mail	@		

6. Other participating institutions

To fill in this part, please use the type of institution codes, country codes and region codes indicated in Annex 1. Please group partners by country in the same order as in that indicated in Annex 1. Check the minimum number of partners and eligible countries required (see *Guidelines for Applicants*).

Add copies of the following pages if necessary.

Participating institution No 2

Full legal name of the institution in the national language			
Acronym of the institution, if applicable			
Full name of the institution in English (formal or informal translation)			
Type of institution code		Erasmus ID code, for Higher Education Institutions only	
Website	http://		
Is the institution able to recover VAT?	Yes () No ()		
Postcode		Town / City	
Country code		Region code	
Contact person	Gender	Male () Female ()	
Family name :		First name :	
Department/Unit			
Official function within the institution			
Telephone (including country and area code)	(+)	Fax (including country and area code)	(+)
E-mail	@		

² All correspondence relating to the project will be addressed to this person.

Participating institution No 3

Full legal name of the institution in the national language			
Acronym of the institution, if applicable			
Full name of the institution in English (formal or informal translation)			
Type of institution code		Erasmus ID code, for Higher Education Institutions only	
Website	http://		
Is the institution able to recover VAT?	Yes () No ()		
Postcode		Town / City	
Country code		Region code	
Contact person	Gender	Male () Female ()	
Family name :		First name :	
Department/Unit			
Official function within the institution			
Telephone (including country and area code)	(+)	Fax (including country and area code)	(+)
E-mail	@		

Participating institution No 4

Full legal name of the institution in the national language			
Acronym of the institution, if applicable			
Full name of the institution in English (formal or informal translation)			
Type of institution code		Erasmus ID code, for Higher Education Institutions only	
Website	http://		
Is the institution able to recover VAT?	Yes () No ()		
Postcode		Town / City	
Country code		Region code	
Contact person	Gender	Male () Female ()	
Family name :		First name :	
Department/Unit			
Official function within the institution			
Telephone (including country and area code)	(+)	Fax (including country and area code)	(+)
E-mail	@		

Participating institution No 5

Full legal name of the institution in the national language			
Acronym of the institution, if applicable			
Full name of the institution in English (formal or informal translation)			
Type of institution code		Erasmus ID code, for Higher Education Institutions only	
Website	http://		
Is the institution able to recover VAT?	Yes () No ()		
Postcode		Town / City	
Country code		Region code	
Contact person	Gender	Male () Female ()	
Family name :		First name :	
Department/Unit			
Official function within the institution			
Telephone (including country and area code)	(+)	Fax (including country and area code)	(+)
E-mail	@		

Participating institution No 6

Full legal name of the institution in the national language			
Acronym of the institution, if applicable			
Full name of the institution in English (formal or informal translation)			
Type of institution code		Erasmus ID code, for Higher Education Institutions only	
Website	http://		
Is the institution able to recover VAT?	Yes () No ()		
Postcode		Town / City	
Country code		Region code	
Contact person	Gender	Male () Female ()	
Family name :		First name :	
Department/Unit			
Official function within the institution			
Telephone (including country and area code)	(+)	Fax (including country and area code)	(+)
E-mail	@		

Participating institution No 7

Full legal name of the institution in the national language			
Acronym of the institution, if applicable			
Full name of the institution in English (formal or informal translation)			
Type of institution code		Erasmus ID code, for Higher Education Institutions only	
Website	http://		
Is the institution able to recover VAT?	Yes () No ()		
Postcode		Town / City	
Country code		Region code	
Contact person	Gender	Male () Female ()	
Family name :		First name :	
Department/Unit			
Official function within the institution			
Telephone (including country and area code)	(+)	Fax (including country and area code)	(+)
E-mail	@		

SECTION 2 - DECLARATION

To be completed by the person legally authorised to sign on behalf of the coordinating institution.

"I, the undersigned, certify that the information contained in this application, including Section 4 (description) is correct to the best of my knowledge.

The appropriate authorities of all the participating institutions have read and fully understood the application as submitted. They have confirmed in writing their agreement with the application as submitted.³

I declare on my honour that the institution I represent has **the financial and operational capacity** to carry out the proposal as submitted and that it does not fall under any of the exclusion criteria listed in chapter II of the *General Call for Proposals 2005*.

I acknowledge that in case of false declarations, administrative and financial sanctions can be implemented against me or the institution I represent."

By 1 March 2005, I have arranged for each of the other participating institutions to send to the appropriate National Agency, in its country, a copy of the present application, together with a translation of Section 1 Point 2 and Section 4 in the language of the National Agency concerned, if this has been requested by the National Agency concerned.

For Lingua I, II, Grundtvig, I.I, I.2 and Comenius II.I and Minerva applications:

I am also sending a copy of the present application to the appropriate National Agency in my country (together with a translation of Section 1 Point 2 and Section 4 in the language of this National Agency, if it is not the same as the language of the present).

Place: _____ Date / / (day/month/year)

Signature _____ Stamp of the coordinating institution, if applicable

Name and position in capitals

NAME

POSITION

³ The Commission reserves the right to request a copy of these agreements.

Checklist

The application is completed in full . All questions have been answered .	<input type="checkbox"/>
Each page has been numbered .	<input type="checkbox"/>
The budget covers the whole project/network period, is indicated in euros and has been checked for calculation errors .	<input type="checkbox"/>
The application has been type-written or word-processed in one of the 20 eligible languages by using the correct application form .	<input type="checkbox"/>
The original application has been signed in original by the legal representative of the coordinating institution.	<input type="checkbox"/>
The original, 4 copies and a diskette containing MS Word files with the project/network summary in DE, FR or EN and a copy of the original application are being sent to the Socrates, Leonardo & Youth Technical Assistance Office by post and in the same envelope before the closing date .	<input type="checkbox"/>
The bank details form (annex 3) has been filled in and duly signed in original. ⁴	<input type="checkbox"/>
The legal entity form (annex 4) has been filled and duly signed in original	<input type="checkbox"/>
Documents for verification of financial capacity are attached	<input type="checkbox"/>
If the grant requested exceeds 300,000 euros and if the applicant is neither a public body nor a secondary or a higher education establishment, an external audit report produced by an approved auditor will be requested.	
In case of Lingua I, II; Grundtvig I, I.1, I.2; Comenius II.1 and Minerva, the necessary copies and translations are being sent to the National Agency in the country of each of the other participating institutions before the closing date.	<input type="checkbox"/>

⁴ If your application was to be selected and your bank details changed before the issue of the contract, you must inform the Commission about this change urgently in writing. In any case, any such change will lead to a delay in your advance payment.

SECTION 3 - BUDGET

General instructions

- Before completing this section, please read carefully the *Explanatory notes on the budget (Annex 2)*. If you require further information, you may consult the *Administrative and Financial Handbook for Applicants for Transnational Cooperation Projects*.
- The budget should cover the entire period of the SOCRATES grant (one, two or three years). The budget should be coherent with the work plan in Section 4.
- All amounts should be provided in euros.
- Please adhere strictly to the format provided in the tables, and check carefully the figures provided (applications containing calculation errors will be penalised in the selection process).

Table 1 : Overview of expenditure

Type of costs	Costs (€)
1. Staff costs	
2. Direct costs	
2.1 - Travel and subsistence	
2.2 - Equipment and materials	
2.3 - Sub-contracting, consultancy and other external services	
2.4 - Other costs	
Subtotal for Direct costs	
3. General costs	
TOTAL (identical to the total in Table 2)	_____

Table 2 : Overview of income

Sources	Amounts (€)
1) Grant requested from the SOCRATES programme	
2) Contribution from the regular budget of the participating institutions	
3) Support from public (national, regional, etc) sources, provided specifically for this project/network	
4) Support from the private sector or foundations, provided specifically for this project/network	
5) Other sources	
TOTAL (identical to the total in Table 1)	_____

Specification for Table 2

If income is indicated under items 3), 4) or 5), please specify the source envisaged.

Table 3: Specification for Contribution per participating institution

The reference numbers (No 1, 2, 3, etc.) of the participating institutions must correspond to those used in Section 1, questions 5 and 6 of the application and be grouped by country in the same order as that indicated in Annex 1. Add copies of this present page for the additional participating institutions, if necessary.

All amounts in euros	Total (equals amount in Table 2, item 2)	Coordinating institution (=Participating institution No 1)	Participating institution No 2	Participating institution No 3	Participating institution No....
Contribution from the regular budget of the participating institution					

Explanation for allocation of grant per participating institution

On what basis do you intend to distribute the SOCRATES grant among the participating institutions?

Table 4 : Specification for Staff costs

The reference numbers (No 1, 2, 3, etc.) of the participating institutions must correspond to those used in Section 1, questions 5 and 6 of the application and be grouped by country, using the same order as in Annex 1. Add copies of this present page for the additional participating institutions, if necessary.

All costs in euros	Total			Coordinating institution (=Participating institution No 1)			Participating institution No 2			Participating institution No 3			Participating institution No....			
	Staff by category (*) :	Total number of days (a)	Average cost per day (b)	Total staff cost (a x b)	Total number of days (a)	Average cost per day (b)	Total staff cost (a x b)	Total number of days (a)	Average cost per day (b)	Total staff cost (a x b)	Total number of days (a)	Average cost per day (b)	Total staff cost (a x b)	Total number of days (a)	Average cost per day (b)	Total staff cost (a x b)
Staff Category 1(*)																
Staff Category 2(*)																
Staff Category 3(*)																
Staff Category 4(*)																
Total																

(*)Please refer to the International Standard Classification of Occupations (ISCO) as described in Annex 2 – Appendix A.

Tables 5 : Specification for Direct costs

- 5.A - Travel and subsistence

Purpose of journey	Number of return journeys (a)	Average costs per journey (€) (b)	Total cost (a x b)
Total identical to item 2.1 in Table 1			€

- 5.B - Equipment and materials

In the case of purchase of hardware costing over €1,000 per item, please indicate the depreciation rate. Before completing read carefully section D.2.2 of the explanatory note.

Description	Number of items	Cost of purchase or rent (€)	Usage rate %	Depreciation rate %	Total cost
Total identical to item 2.2 in Table 1					€

- 5.C - Sub-contracting, consultancy and other external services

Subcontract	Task description	Number of person days (a)	Cost per day (€) (b)	Other costs (€) (c)	Total cost (a x b)+c
Subcontract 1					
Subcontract 2					
Subcontract 3					
Total identical to item 2.3 in Table 1					€

- 5.D - Other costs

Description	Number of items (a)	Cost per item (€) (b)	Total cost (a x b)
Total identical to item 2.4 in Table 1			€

Table 6: Subdivision of costs according to workplan

Please use below one of the subdivisions indicated in your workplan table in Section 4.

Indicate here the type of subdivision you choose	Staff Costs (€) (a)	Direct Costs (€) (b)	General Costs (€) (c)	Total (a+b+c)
Total identical to the total of Table 1				€

SECTION 4 - DESCRIPTION GRUNDTVIG 1: EUROPEAN COOPERATION PROJECTS, GRUNDTVIG TRAINING COURSES AND GRUNTDIG DISSEMINATION PROJECTS

Please describe **all aspects** of your project set out below, on **numbered sheets**, using the **same order** and the **same numbering of questions** as given in the questions. Please respect the **maximum length** of text indicated. No **supporting documents** should be provided.

Please note that all questions refer to all three types of activities supported under Grundtvig 1 i.e. the European Cooperation Projects, the Grundtvig Training Courses and the Grundtvig Dissemination Projects unless otherwise specified.

1. Typology

Please tick the appropriate boxes.

groups (select up to 3 items)

(section of the learning population which will ultimately benefit from the project)

- General or unspecified
- Migrants / ethnic or other minorities
- Unemployed persons
- Persons in prison or ex-offenders
- Young persons (approximately 16-25 age range) at risk of social marginalisation
- Adult learners in rural areas
- Disabled persons
- Other economically or socially disadvantaged groups
- Senior citizens
- Young and adult female persons
- Young and adult male persons
- Other specific target group, namely:

Thematic orientation (select up to 3 items)

- Politics, theory, history of adult education and lifelong learning
- Basic skills
- Active citizenship (active participation in all sectors of civil society)
- Information and communication technologies, media
- Intercultural learning/ learning to fight racism / xenophobia
- Art and culture
- Europe (other European countries, European Union etc.)
- Language learning
- Family / parent education
- Gender issues
- Inter-generational learning / Learning in later life
- Education in prisons or for social reinsertion of offenders
- Education in hospitals
- Learning communities / cities / regions (including rural areas)
- Environment and sustainable development
- Health / Sports
- Science
- Ethics/ Philosophy, Religion or spiritual dimensions
- Consumer education
- Financial literacy / Basic Economic understanding
- Global developments

- Developing the lifelong learning dimension of higher education institutions
- Strategies for funding adult education
- Management of adult education
- Other, namely:

Type of project (select up to 3 items)

(mode of intervention envisaged in order to improve adult education / lifelong learning)

- Strategies for promoting / marketing lifelong learning or for stimulating demand for learning among the adult population
- Measures to strengthen the European dimension of institutions or publications
- Guidance and counselling, development of information services and data bases on learning opportunities for adults
- ICT-based tools or platforms ; development of distance learning opportunities; use of media in adult education
- Innovation and improvement in teaching & learning processes (methodologies, materials, modules, curricula etc.), in adult education or the training of adult education staff
- Creation of specific opportunities for further training of adult educators (conception and organisation of training courses etc.)
- Creation of specific opportunities for further training of staff involved in the management or other non-teaching aspects of adult education
- Procedures and tools for assessment, certification, validation, recognition, accreditation of prior learning
- Quality assurance strategies in adult education ; indicators and benchmarking in lifelong learning
- In-depth comparative studies on lifelong learning / adult education; other activities with strong emphasis on research
- Developing the lifelong learning dimension of libraries or cultural organisations such as museums and art galleries
- Opening new environments for lifelong learning, for example in shopping areas, at sports events, in leisure facilities
- Developing strategies for adult lifelong learning as a contribution to regional development (learning cities, towns and regions), also in rural areas
- Second chance schools or courses for persons without school leaving certificates and/or apprenticeship certificates
- Prison education and education for social re-insertion of offenders
- Education in hospitals and social care institutions
- Training and counselling of project co-ordinators
- Evaluation and/or dissemination of previous projects supported at European, national, regional or local level
- Other, namely:

2. Rationale, Objectives, Target Groups (maximum 2 pages)

- 2.1 Explain the **rationale** of and **background** to the project (current situation in the countries involved, previous or preparatory work, the results of any needs analysis undertaken, etc.).
- 2.2 Define the concrete **aims and objectives** of the project and describe the ways in which the situation set out under 2.1 above will be changed and the needs addressed by the project.
- 2.3 Explain what you consider to be **innovative** about the project (in relation to each of the participating countries, if the situation is different in each of them).
- 2.4 Indicate, if applicable, the main **pedagogical and didactical approaches** and concepts which will be promoted by means of the project.
- 2.5 Specify the nature and size of the sections of the population (**target groups**) which the project is designed to benefit, i.e. the specific groups of learners / practitioners / organisations in the participating countries (and other countries if relevant) whose learning / teaching opportunities will be directly or indirectly enhanced as a result of the project.
- 2.6 Indicate the added value of carrying out the project with partners from several European countries compared with a purely national approach.

3. Envisaged outputs (maximum 2 pages)

3.1 Describe precisely the envisaged **outputs** of the project.

In case of **European Cooperation Projects** please provide information on:

- the outputs such as curricula, didactic materials, conception and organisation of courses for the training of adult educators, guides / manuals, codes of good practice, assessment or certification tools, web-based exercises, data bases, multimedia products, websites, etc.,
- the nature, volume, structure, content and language envisaged (using the language codes listed in Annex 1 of this form) for each output.

In case of **Grundtvig Training Courses** please provide information on:

- the precise topic(s) of the course,
- the types of participants to whom the course is addressed,
- the place and approximate dates of the two course sessions to be held during the project duration (see 6.5 below),
- the teaching approach envisaged including the language of tuition,
- the team of trainers giving the course,
- the approximate number of teaching hours,
- the certification you envisage for participants in the course.

In case of **Grundtvig Dissemination Projects** please provide information on:

- the dissemination activities envisaged (such as organisation of conferences, workshops, seminars, development and organisation of training courses, implementation of information campaigns in the media or other methods of written dissemination, online dissemination tools etc.),
- the methodology you envisage for selecting the particular projects/networks whose results are to be disseminated,
- the projects you provisionally intend to select for dissemination (specifying the Grundtvig project number as well as the website of the projects concerned),
- the strategy you intend to use for adapting the outcomes to other countries / cultures / languages,
- the strategy you envisage for ensuring that a broader public will be made familiar with the results to be disseminated
- the approach proposed to overcome linguistic barriers in the dissemination of the project results.

3.2 Indicate **for each output** the categories of persons / organisations (1) within and (2) beyond the participating institutions who will directly use it, the ultimate target groups addressed and the specific context in which the output will be used.

3.3 Make specific reference to any outputs relating to **information and communication technologies**, as a pedagogical or management tool, as a competence to be acquired by learners or other groups as a result of the project, or as a tool for the dissemination of results.

3.4 Indicate how and to what extent the organisations directly participating in the project would themselves **implement** each of the outputs of the project in their daily work.

4. Monitoring, evaluation and dissemination (maximum 2 pages)

4.1 Describe how the progress and functioning of the project will be **monitored**.

4.2 Describe how the project and the quality of the outputs will be **evaluated** (indicate the means envisaged for both internal and external evaluation), particularly with regard to any impact evaluation envisaged.

4.3 Describe how the experiences and outputs of the project (process and product) are to be **disseminated** in the countries participating in the project and, if applicable, beyond, providing concrete details of the dissemination methods and channels you envisage.

5. Partnership composition and contribution

- 5.1 Provide for the **coordinating institution** and **each of the other institutions participating** in the project, the following information:
- **type** of institution (legal status in national language accompanied by an approximate translation into English, French or German if possible; short description of main areas and types of activity);
 - **size** of the institution in terms of the total number of (a) personnel (absolute numbers and full-time equivalents) and (b) learners;
 - **expertise** of the institution in the field covered by the project and **experience** in cooperation at local, regional, national and trans-national level (Socrates and other). Indicate experience both in content and project organisation;
 - the **specific tasks** to be assigned to this institution within the project;
 - number and profile of **personnel** (in absolute numbers and as full-time equivalents) or experts expected to be **involved in the project**.
- 5.2 Specify how effective **cooperation and communication** will be ensured between the partner institutions, the main working language(s) to be used, and the specific arrangements envisaged for resolving any conflicts which may arise between the partners.
- 5.3 **In addition** to the formal partner institutions, list any **other institutions** which will participate actively in the project without receiving support from the Socrates grant (name, address, type of institution, contact person).

6. Planning of activities (maximum 2 pages plus table)

- 6.1 Describe and justify the **overall working methods** the partnership intends to use when carrying out the project (management procedures, research and pedagogical methods, data gathering, joint design, types of meetings, teleconferencing etc.).
- 6.2 Justify in overall terms the **duration** of the Socrates support (one, two or three years), in relation to the nature and number of the outputs envisaged (note the specified duration of Grundtvig Training Course Projects: 2 years).
- 6.3 Explain how the partnership will ensure that the activities conducted and results achieved by the project can be continued and sustained when the financial support from Grundtvig is reduced or phased out completely (**sustainability strategy**).
- 6.4 On the basis of the above, provide an overall **work plan** using the table format given below. To this end, please:
- Divide the project into relevant **stages** (such as needs analysis, collection of materials, drafting, editing, testing, production of material, publication, dissemination, organisation of courses etc.) which you envisage in order to produce the project outputs identified;
 - Show within each stage, what **activities** the partnership will undertake, which **partner(s)** will be responsible for each stage, how many **persons** (person / days or person / months) each activity will require and **by when** each activity will have been completed.
- 6.5 In the case of **Grundtvig Training Courses** please include in your timetable a clear indication of (1) when the training course will be tested and (2) when, on at least two occasions during the two-year project, the training course will be organised as an offering to Grundtvig 3 applicants Europe-wide.
- 6.6 In case of **Grundtvig Dissemination Projects** please include in your timetable a clear indication when the conferences, workshops, seminars, training courses or other dissemination activities will take place.

7. Contribution to transversal policies (maximum 1 page)

In terms of (a) the **impact of the project** on the target group (section of the educational community ultimately addressed), and (b) **participation in the project itself**, please provide concrete details of how and to what extent the project will actively:

- promote equal opportunities between women and men;
- promote equal opportunities for disabled persons;
- contribute to the fight against racism and xenophobia;
- promote social and economic cohesion;
- promote ICT in education and eLearning;
- promote language learning and linguistic diversity;
- promote the recent enlargement of the Union;
- promote sustainable development;
- promote stability and security;
- tackle the future challenges to education and training systems and lifelong learning.

8. Other aspects (maximum 1 page)

Please state any other aspects of the proposed project which you feel the Commission should take into account when assessing your proposal.

Work Plan

Project:					
Stage in life of project	Outputs: By the end of this stage we will have achieved / produced	Activities leading to this output	Starting and completion date of the activity	Partners / Persons involved	Time input (person / days or person / months)
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

ANNEXES

ANNEX 1

Annex 1: List of codes to be used in the application

You will find here the codes you will have to use when filling in the application, i.e. :

- Type of institution codes
- Country codes
- Language codes
- Region codes (NUTS)

Type of Institution(*)	
EDU.1	Nursery school
EDU.2	Primary school
EDU.3	Secondary school (incl. Vocational / technical)
EDU.4	Higher education institution
EDU.5	Adult or continuing education provider
ASS.1	Non-profit association (regional/national)
ASS.2	Non-profit association (European / international)
ASS.3	Association of Universities
RES	Research institute
PUB.1	Public authority (local)
PUB.2	Public authority (regional)
PUB.3	Public authority (national)
IND	Private company (manufacturing)
SER	Private company (services)
OTH	Other type of organisation

(*) The term "Institution" is understood to mean any type of institution, establishment or organisation eligible to participate in the Action of the SOCRATES Programme to which the present application form refers (see *Guidelines for Applicants*)

Country				Language(**)			
BE	Belgium	NL	The Netherlands	CZ	* Czech	PL	* Polish
CZ	Czech Republic	AT	Austria	DA	* Danish	PO	* Portuguese
DK	Denmark	PL	Poland	DE	* German	SI	* Slovene
DE	Germany	PT	Portugal	EL	* Greek	SK	* Slovak
GR	Greece	SI	Slovenia	EN	* English	SE	* Swedish
ES	Spain	SK	Slovak Republic	ES	* Spanish		
EE	Estonia	FI	Finland	EE	* Estonian	GA	Irish
FR	France	SE	Sweden	FI	* Finnish	LE	Letzeburgesch
IE	Ireland	UK	United Kingdom	FR	* French		
IT	Italy			IT	* Italian	IS	Icelandic
CY	Cyprus	IS	Iceland	LV	* Latvian	NO	Norwegian
LV	Latvia	LI	Liechtenstein	LT	* Lithuanian	BG	Bulgarian
LT	Lithuania	NO	Norway	HU	* Hungarian	RO	Romanian
LU	Luxembourg	BG	Bulgaria	MT	* Maltese	TR	Turkish
MT	Malta	RO	Romania	NL	* Dutch		
HU	Hungary	TR	Turkey				

(**) Only the languages shown in this table are eligible "target languages" for Lingua projects, and for language projects within Comenius.

REGION CODES (NUTS)

BE BELGIUM

BE1	BRUXELLES CAP. BRUSSEL HOF
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BE21	ANTWERPEN
BE22	LIMBURG
BE23	OOST-VLAANDEREN
BE24	VLAAMS BRABANT
BE25	WEST VLAANDEREN

BE31	BRABANT WALLON
BE32	HAINAUT
BE33	LIEGE
BE34	LUXEMBOURG
BE35	NAMUR

DK DANMARK

DK001	Københavns og Frederiksberg Kommuner
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DK002	KØBENHAVNS AMT
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DK003	FREDERIKSBORG AMT
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DK004	ROSKILDE AMT
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DK005	VESTSJÆLLANDS AMT
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DK006	STORSTRØMS AMT
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DK007	BORNHOLMS AMT
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DK008	FYNS AMT
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DK009	SØNDERJYLLANDS AMT
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DK00A	RIBE AMT
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DK00B	VEJLE AMT
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DK00C	RINGKØBING AMT
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DK00D	ÅRHUS AMT
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DK00E	VIBORG AMT
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DK00F	NORDJYLLANDS AMT
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DE DEUTSCHLAND

BADEN WÜRTTEMBERG	
DE11	STUTT GART
DE12	KARLSRUHE
DE13	FREIBURG
DE14	TÜBINGEN

BAYERN	
DE21	OBERBAYERN
DE22	NIEDERBAYERN
DE23	OBERPFALZ
DE24	OBERFRANKEN
DE25	MITTELFRANKEN
DE26	UNTERFRANKEN
DE27	SCHWABEN

DE3	BERLIN
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DE4	BRANDENBURG
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DE5	BREMEN
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DE6	HAMBURG
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NIEDERSACHSEN	
DE91	BRAUNSCHWEIG
DE92	HANNOVER
DE93	LÜNEBURG
DE94	WESER-EMS

NORDRHEIN-WESTFALEN	
DEA1	DÜSSELDORF
DEA2	KÖLN
DEA3	MÜNSTER
DEA4	DETMOLD
DEA5	ARNSBERG

RHEINLAND-PFALZ	
DEB1	KOBLENZ
DEB2	TRIER
DEB3	RHEINHESSEN - PFALZ

DEC	SAARLAND
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SACHSEN	
DED1	CHEMNITZ
DED2	DRESDEN
DED3	LEIPZIG

HESSEN	
DE71	DARMSTADT
DE72	GIESSEN
DE73	KASSEL

DE8	MECKLENBURG-VORPOMMERN
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GR	ELLADA
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VOREIA ELLADA	
GR11	ANATOLIKI MAKEDONIA, THRAKI
GR12	KENTRIKI MAKEDONIA
GR13	DYTIKI MAKEDONIA
GR14	THESSALIA

KENTRIKI ELLADA	
GR21	IPEIROS
GR22	IONIA NISIA
GR23	DYTIKI ELLADA

ES	ESPAÑA
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NOROESTE	
ES11	GALICIA
ES12	ASTURIAS
ES13	CANTABRIA

NORESTE	
ES21	PAÍS VASCO
ES22	NAVARRA
ES23	LA RIOJA
ES24	ARAGÓN

ES3	COMUNIDAD DE MADRID
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ES7	CANARIAS
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FR	FRANCE
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FR1	ILE DE FRANCE
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BASSIN PARISIEN	
FR21	CHAMPAGNE – ARDENNE
FR22	PICARDIE
FR23	HAUTE NORMANDIE
FR24	CENTRE
FR25	BASSE NORMANDIE
FR26	BOURGOGNE

FR3	NORD - PAS DE CALAIS
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EST	
FR41	LORRAINE
FR42	ALSACE
FR43	FRANCHE-COMTE

SACHSEN-ANHALT	
DEE1	DESSAU
DEE2	HALLE
DEE3	MAGDEBURG

DEF	SCHLESWIG-HOLSTEIN
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DEG	THÜRINGEN
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GR3	ATTIKI
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NISIA AIGAIU, KRITI	
GR41	VOREIO AIGAIO
GR42	NOTIO AIGAIO
GR43	KRITI

GR24	STEREA ELLADA
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GR25	PELOPONNISSOS
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ESTE	
ES51	CATALUÑA
ES52	COMUNIDAD VALENCIANA
ES53	ISLAS BALEARES

SUR	
ES61	ANDALUCIA
ES62	MURCIA
ES63	CEUTA Y MELILLA

CENTRO	
ES41	CASTILLA-LEÓN
ES42	CASTILLA- LA MANCHA
ES43	EXTREMADURA

SUD-OUEST	
FR61	AQUITAINE
FR62	MIDI-PYRENEES
FR63	LIMOUSIN

CENTRE-EST	
FR71	RHÔNE-ALPES
FR72	AUVERGNE

MEDITERRANEE	
FR81	LANGUEDOC-ROUSSILLON
FR82	PROVENCE-ALPES-CÔTES D'AZUR
FR83	CORSE

OUEST	
FR51	PAYS DE LOIRE
FR52	BRETAGNE
FR53	POITOU-CHARENTE

DEPARTEMENTS D'OUTRE-MER	
FR91	GUADELOUPE
FR92	MARTINIQUE
FR93	GUYANE
FR94	REUNION

IE	IRELAND
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IE011	BORDER
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IE023	MID-WEST
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IE021	DUBLIN
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IE024	SOUTH-EAST (IRL)
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IE022	MID-EAST
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IE025	SOUTH-WEST (IRL)
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IE012	MIDLAND
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IE013	WEST
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IT	ITALIA
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NORD OVEST	
IT11	PIEMONTE
IT12	VALLE D'AOSTA
IT13	LIGURIA

IT6	LAZIO
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IT2	LOMBARDIA
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ABRUZZO-MOLISE	
IT71	ABRUZZO
IT72	MOLISE

NORD EST	
IT31	TRENTINO-ALTO ADIGE
IT32	VENETO
IT33	FRIULI-VENEZIA GIULIA

IT8	CAMPANIA
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IT4	EMILIA-ROMAGNA
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SUD	
IT91	PUGLIA
IT92	BASILICATA
IT93	CALABRIA

CENTRO	
IT51	TOSCANA
IT52	UMBRIA
IT53	MARCHE

ITA	SICILIA
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ITB	SARDEGNA
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LU	LUXEMBOURG (Grand Duché)
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NL	NEDERLAND
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NOORD-NEDERLAND	
NL11	GRONINGEN
NL12	FRIESLAND
NL13	DRENTHE

WEST-NEDERLAND	
NL31	UTRECHT
NL32	NOORD-HOLLAND
NL33	ZUID-HOLLAND
NL34	ZEELAND

OOST-NEDERLAND	
NL21	OVERIJSEL
NL22	GELDERLAND
NL23	FLEVOLAND

ZUID-NEDERLAND	
NL41	NOORD-BRABANT
NL42	LIMBURG (NL)

AT	ÖSTERREICH
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OSTÖSTERREICH	
AT11	BURGENLAND
AT12	NIEDERÖSTERREICH
AT13	WIEN

WESTÖSTERREICH	
AT31	OBERÖSTERREICH
AT32	SALZBURG
AT33	TIROL
AT34	VORARLBERG

SÜDÖSTERREICH	
AT21	KÄRNTEN
AT22	STEIERMARK

PT	PORTUGAL
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CONTINENTE	
PT11	NORTE
PT12	CENTRO
PT13	LISBOA E VALE DO TEJO
PT14	ALENTEJO
PT15	ALGARVE

PT2	AÇORES
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PT3	MADEIRA
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FI	SUOMI / FINLAND
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MANNER-SUOMI	
FI12	ETELÄ-SUOMI
FI13	ITÄ-SUOMI
FI14	VÄLI-SUOMI

FI15	POHJOIS-SUOMI
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FI16	UUSIMAA (SUURALUE)
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FI2	ÅLAND
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SE	SVERIGE
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SE01	STOCKHOLM
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SE06	NORRA MELLANSVERIGE
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SE02	ÖSTRA MELLANSVERIGE
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SE07	MELLERSTA NORRLAND
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SE04	SYDSVERIGE
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SE08	ÖVRE NORRLAND
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SE0A	VÄSTSVRIGE
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SE09	SMÅLAND MED ÖARNA
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UK	UNITED KINGDOM
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NORTH EAST	
UKC1	TEES VALLEY AND DURHAM
UKC2	NORTHUMBERLAND, TYNE AND WEAR

SOUTH WEST(UK)	
UKK1	GLOUCESTERSHIRE, WILTSHIRE AND NORTH SOMERSET
UKK2	DORSET, SOMERSET
UKK3	CORNWALL AND ISLES OF SCILLY
UKK4	DEVON

YORKSHIRE AND THE HUMBER	
UKE1	EAST RIDING AND NORTH LINCOLNSHIRE
UKE2	NORTH YORKSHIRE
UKE3	SOUTH YORKSHIRE
UKE4	WEST YORKSHIRE

WEST MIDLANDS	
UKG1	HEREFORD & WORCESTERSHIRE, WARWICKSHIRE
UKG2	SHROPSHIRE, STAFFORDSHIRE
UKG3	WEST MIDLANDS

EAST MIDLANDS	
UKF1	DERBYSHIRE, NOTTINGHAMSHIRE
UKF2	LEICESTERSHIRE, RUTLAND, NORTHAMPTONSHIRE
UKF3	LINCOLNSHIRE

NORTH WEST (UK)	
UKD1	CUMBRIA
UKD2	CHESHIRE
UKD3	GREATER MANCHESTER
UKD4	LANCASHIRE
UKD5	MERSEYSIDE

EASTERN	
UKH1	EAST ANGLIA
UKH2	BEDFORDSHIRE AND HERTFORDSHIRE
UKH3	ESSEX

LONDON	
UKI1	INNER LONDON
UKI2	OUTER LONDON

WALES	
UKL1	WEST WALES AND THE VALLEYS
UKL2	EAST WALES

SOUTH EAST (UK)	
UKJ1	BERKSHIRE, BUCKINGHAMSHIRE, OXFORDSHIRE
UKJ2	SURREY, EAST AND WEST SUSSEX
UKJ3	HAMPSHIRE, ISLE OF WIGHT
UK55	GREATER LONDON
UKJ4	KENT

SCOTLAND	
UKM1	NORTH EASTERN SCOTLAND
UKM2	EASTERN SCOTLAND
UKM3	SOUTH WESTERN SCOTLAND
UKM4	HIGHLANDS AND ISLANDS

UKN	NORTHERN IRELAND
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IS	ISLAND
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LI	LIECHTENSTEIN
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NO	NORGE
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NO01	OSLO OG AKERSHUS
NO02	HEDMARK OG OPPLAND
NO03	SØR-ØSTLANDET
NO04	AGDER OG ROGALAND

NO05	VESTLANDET
NO06	TRØNDELAG
NO07	NORD-NORGE

BG	BÄLGARIJA
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BG1	SOFIA STOLITSA
BG2	SEVERNA BÄLGARIJA

BG3	YUZHNA BÄLGARIJA
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CZ	ČESKÁ REPUBLIKA
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CZ01	PRAHA
CZ02	STŘEDNI ČECHY
CZ05	SEVEROVÝCHOD
CZ06	JIHOVÝCHOD

CZ03	JIHOZÁPAD
CZ04	SEVEROZÁPAD
CZ07	STŘEDNI MORAVA
CZ08	OSTRAVSKO

EE	EESTI
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CY	KYPROS
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LV	LATVIJA
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LT	LIETUVA
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HU	MAGYARORSZÁG
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HU01	KÖZÉP-MAGYARORSZÁ
HU02	KÖZÉP-DUNÁNTÚL

HU05	ÉSZAK-MAGYARORSZÁG
HU06	ÉSZAK-ALFÖLD

HU03	NYUGAT- DUNÁNTÚL
HU04	DÉL- DUNÁNTÚL

HU07	DÉL-ALFÖLD
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MT	MALTA
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PL	POLSKA		
PL01	DOLNOŚLASKIE	PL09	PODKARPACKIE
PL02	KUJAWASKO-POMORSKIE	PL0A	PODLASKIE
PL03	LUBELSKIE	PL0B	POMORSKIE
PL04	LUBUSKIE	PL0C	ŚLASKIE
PL05	ŁÓDZKIE	PL0D	ŚWIETOKRZYSKIE
PL06	MAŁOPOLSKIE	PL0E	WARMIŃSKO-MAZURSKIE
PL07	MAZOWIECKIE	PL0F	WIELKOPOLSKIE
PL08	OPOLSKIE	PL0G	ZACHODNIOPOMORSKIE
RO	ROMÂNIA		
R001	NORD-EST	R003	SUD
R002	SUD-EST	R004	SUD-VEST
R005	VEST	R007	CENTRU
R006	NORD-VEST	R008	BUCUREȘTI
SI	SLOVENIJA		
SK	SLOVENSKÁ REPUBLIKA		
SK01	BRATISLAVSKÝ KRAJ	SK03	STREDNÉ SLOVENSKO
SK02	ZÁPADNÉ SLOVENSKO	SK04	VÝCHODNÉ SLOVENSKO
TR	TURKEY		

Annex 2: Explanatory notes on the budget (Section 2)

A. Introduction

These Notes provide applicants with information concerning the financial procedure, the rules for eligibility of costs and guidance on how to complete Section 2 (Budget) of the application forms for transnational co-operation projects or networks under the following Actions:

- Comenius 2.1 and 3
- Erasmus 1 and 3
- Grundtvig 1 and 4
- Lingua 1 and 2
- Minerva

B. Financial procedure

1. **Presentation of financial data by the Applicant**

For the presentation of the budget, a distinction is made between the following main categories of expenditure (see section D below for details):

1. Staff costs
2. Direct costs:
 - 2.1 Travel and subsistence costs
 - 2.2 Costs relating to the purchase or rental of hardware and equipment
 - 2.3 Subcontracting costs
 - 2.4 Other costs
3. General costs

2. **Financial analysis of proposals**

The *budget proposed* by the co-ordinator is analysed by the Commission in order to:

- a) assess whether it is consistent with the proposed project and sufficiently clear and detailed;
- b) assess whether the proposed budget is appropriate for achieving the concrete objectives / results of the project;
- c) eliminate any item of expenditure which cannot be accepted according to the rules on eligible expenditure;
- d) propose, if necessary, a downward revision of some items of expenditure, where these are considered excessive compared to the nature of the project and/or to the volume of work to be implemented in order to achieve the planned results.

At the end of this analysis, an *approved budget* for the project is drawn up by the Commission. If the proposed budget is realistic and acceptable in relation to Community rules, the proposed budget and the approved budget will be identical, and the Community grant may be the same as the amount requested by the applicant. In most cases, however, the analysis is likely to result in reductions.

3. **Calculation of the Socrates grant**

Once the approved budget has been defined, the grant to be awarded is calculated on the following basis:

- the total grant may not exceed the amount requested by the applicant;
- the total grant may not normally exceed 75% of the approved budget. In most cases, it is likely to be fixed at an appreciably lower level;
- the policy for awarding grants under the specific Socrates Action concerned;
- the available budget.

A table is drawn up by the Commission containing the approved budget and the grant envisaged distinguishing between staff costs and direct costs. General costs may not be covered by the grant.

C. Rules on Eligibility of costs

1. General Principles

The applicant must ensure that:

- all costs presented are necessary for the carrying out of the project and are not unnecessarily high;
- no member organisation of the partnership may derive a profit from financial assistance awarded by the European Community;
- each item of expenditure is only included under one heading.

All costs must be actual expenses, except for the lump sums allowed under these rules. At the end of the project, all expenditure except for items based on lump sums, must be justified by receipted invoices or equivalent accounting documents.

VAT may be included as an item of expenditure if it represents a final cost and is not recoverable under the national VAT system.

2. Eligible costs

Costs incurred by member organisations of the partnership are eligible if they are:

- directly related to the implementation of approved activities contained in the project work plan;
- related to activities involving the countries eligible to participate in the programme.

3. Ineligible costs

The following items of costs are not eligible and should therefore not be included under any headings in the Budget:

- entertainment or representation expenses
- replacement costs of persons involved in the project
- expenses for travel to countries other than those participating in the programme, unless explicit prior authorisation is granted by the Commission
- expenditure incurred before or after the period of eligibility for expenditure indicated in the contract
- expenditure already funded by another source, in particular by other Community funds (if complementarity between funds is envisaged, this must be explicitly justified)
- contributions in kind
- costs of invested capital
- provisions for possible future losses or debts
- provisions for liquidation, winding up of business, breaking off of a lease or legal liabilities
- provisions for contractual or moral obligations
- reserve funds
- debts and bad debts
- fines, financial penalties and costs of legal proceedings.

For Comenius 2.1 and Grundtvig 1 projects, see also the last two paragraphs of D.2.1 of these notes.

D. Principles applied to the different categories and types of costs

1. Staff costs

Staff costs refer to any payment made to a **person attached to a member organisation of the partnership or working on a regular or recurrent basis for the project** (regardless of his or her status). Staff costs must be broken down into categories 1 to 4 of the International Standard Classification of Occupations (ISCO). A list of the occupations included in each of these ISCO categories is given in Appendix A.

Staff costs will be calculated on the basis of the actual daily salary/fees of the employee/service provider, multiplied by the number of days to be spent on the project. This calculation may include, if necessary, all the normal charges paid by the employer, such as social security contributions and related costs, but must exclude any bonus, incentive and profit-sharing arrangements or running costs. **Staff costs may not exceed the normal costs for each staff category in the country concerned.** In any case, the following maximum amounts apply:

- Staff category 1 (maximum amount 450 euros/day)
- Staff category 2 (maximum amount 300 euros/day)
- Staff category 3 (maximum amount 250 euros/day)
- Staff category 4 (maximum amount 125 euros/day)

If it is planned to employ or hire the services of persons, whose costs exceed these maximum amounts, the necessary explanations should be provided when submitting the application.

2. Direct costs

2.1 *Travel, accommodation and subsistence costs*

Only travel directly related to the project and concerning precise and clearly identifiable activities will be considered eligible.

Travel and insurance costs are based on the actual costs incurred. The most economical fares must be used. Several travel agencies should be contacted in order to obtain the best possible prices.

Rail travel (first class if the participant prefers and if this is allowed by the institution concerned) must be used for journeys of up to 400 kilometres, except in an emergency or where a sea crossing is involved.

For journeys of more than 400 kilometres (or less where a sea crossing is involved or in an emergency), air travel may be used. Apex tickets or special fares must be used as far as possible. Air travel costs higher than an economy class fare are not allowed.

The cost of travel by car will be eligible, provided it is calculated according to the following conditions:

- a) private car or taxi: the amount to be considered eligible is limited to the cost of one equivalent first class rail fare (regardless of how many people are travelling in the car);
- b) hired car (class A except where more than two persons are travelling, in which case maximum class B may be used): the actual costs will be eligible. However, a hired car may only be used if no other suitable transport is available.

Travel insurance costs will be considered eligible.

Travel costs incurred outside the countries participating in the SOCRATES programme are not eligible, unless explicit prior authorisation is granted by the Commission.

Accommodation and subsistence costs are eligible provided:

- they are indispensable and reasonable, taking into consideration the place of the stay;
- they are calculated in accordance with the internal regulations of the partner concerned;
- they do not exceed the maximum daily amounts per person detailed in the table below:

Country	Maximum in EUR	Country	Maximum in EUR
BE Belgium	150	IS Iceland	183
DK Denmark	179	LI Liechtenstein	174
DE Germany	127	NO Norway	171
GR Greece	113	BG Bulgaria	157
ES Spain	141	CZ Czech Republic	214
FR France	130	EE Estonia	129
IE Ireland	165	CY Cyprus	100
IT Italy	130	LV Latvia	174
LU Luxembourg	143	LT Lithuania	126
NL The Netherlands	148	HU Hungary	136
AT Austria	122	MT Malta	86
PT Portugal	143	PL Poland	227
FI Finland	156	RO Romania	185
SE Sweden	157	SI Slovenia	148
UK United Kingdom	199	SK Slovakia	164
		TR Turkey	114

The amounts specified in this table include all costs associated with the stay in the country concerned. If there is no overnight stay, the amounts are reduced by 50%.

Within these limits, accommodation and subsistence expenses may be reimbursed on an actual or fixed cost basis. However, if the internal regulations of the institution of the person making the journey impose a lower limit than the amounts in the above table, this lower amount must be used.

Projects are required to pay for up to two trips to Brussels a year from this budget item in order to attend the Co-ordinators Meetings.

For Comenius 2.1 and Grundtvig 1 projects, operating and mobility costs related to the organisation of continuous training activities are only eligible for testing the courses concerned. Costs related to the organisation of continuous training activities will be funded through mobility grants provided within the framework of Comenius 2.2 and Grundtvig 3.

Travel and subsistence costs, within the framework of Comenius 2.1, are not considered as eligible expenditure as far as the students taking part in initial training activities are concerned.

2.2 Costs related to the purchase, leasing or rental of hardware and other equipment

The costs relating to the acquisition of hardware and other equipment, whether by purchase, leasing or rental, is only eligible if it is strictly necessary for carrying out the project.

The decision to lease, rent or purchase hardware or equipment must be based on the least expensive method. Several suppliers must be contacted in order to obtain the most economic terms.

In the case of rental or leasing, the cost of any buy-out option at the end of the lease or rental period is ineligible.

Where the purchase of hardware and equipment is allowed, installation, maintenance and insurance costs are also eligible, but limited to the proportional use of the equipment for the project. The whole of the costs for the reference period will be considered as eligible, but adapted according to the percentage of use within the scope of the project.

When the purchase of hardware or equipment is allowed, eligible expenditure is calculated as follows:

- a) for the purpose of calculating depreciation, hardware and equipment will be considered as having a life expectancy of three years, where the purchase price exceeds 1,000 EUR;
- b) costs per annum will be calculated on the basis of a depreciation factor of 33.33%, adjusted to the percentage use in the project concerned. For example, the allowable cost in year one for a piece of equipment worth 10,000 EUR, which is used 50 % for the project, amounts to 1,666 EUR:

$$10\,000 \times 33.33\% \times 50\% = 1,666 \text{ EUR}$$

In the second year of the project, eligible costs will also be 1,666 EUR if the percentage use of the hardware or equipment remains the same. If the hardware or equipment is not planned to be used for the project in the second year, then no cost (depreciation or other) will be considered eligible;

- c) where the total value of the hardware or equipment does not exceed 1,000 EUR, then the full purchase value will be allowed as eligible expenditure for the relevant year, adjusted to the percentage use in the project;
- d) depreciation or purchase costs will not be eligible if the hardware or equipment was purchased prior to the start of the period of eligible expenditure indicated in the contract, except in the cases of renewed projects where the depreciation costs were allowed as eligible expenditure for the previous contractual year.

2.3 Cost of subcontracting, consultancy and commissioning other outside experts

Any amount paid to an outside body **which is not part of a member organisation of the partnership** and which carries out **specific and limited work** for the project, shall be charged to the heading "Subcontracting costs". Work such as translation, interpretation and printing carried out by bodies outside the partnership organisations, is considered as subcontracting costs.

Such expenditure may only be allowed if the staff of the member organisations of the partnership do not have the skills required for the performance of the work concerned.

Subcontracting costs will only be considered eligible if they are in accordance with the provisions of the Agreement concluded with the Commission. If a member of the partnership is required to conclude a subcontracting contract, he/she must enter into an agreement with the subcontractor which assures that the subcontractor will comply with the main Agreement concluded between the applicant and the Commission.

Subcontracting agreements must contain at least the following information:

- subject of the subcontracting
- dates of start and end of subcontracting
- amount to be paid
- detailed description of costs
- work schedule or phases
- payment procedures (one or more instalments, staggered payment, etc.)
- penalty clause(s) in the event of non-fulfilment of the subcontracting agreement or delays in the performance of work.

None of the basic activities of the project may be subcontracted, in order not to distort the partnership concept. For this reason, the beneficiary may not subcontract the management and general administration of the project, and no member organisation of the partnership may subcontract the majority of the activities assigned to it.

If the subcontracting agreement for a particular kind of service (e.g. translations, publications, etc.) exceeds 10,000 EUR, the beneficiary must obtain three competitive quotes, and the partnership must confirm its agreement with the concluding of the subcontracting agreement.

If the beneficiary calls on the services of an outside expert (i.e. a person not on the payroll of the organisations constituting the project partnership) as a consultant, the costs will be eligible subject to the conditions mentioned above and provided that they are strictly necessary for the performance of the project and are reasonable in amount. The remuneration of the consultant should not normally exceed 400 EUR per day (VAT excluded). All the costs directly connected with sub-contracting must be declared under the subcontracting budget heading whatever the nature of the costs concerned (e.g. travel costs). The costs of an independent consultant working full-time or frequently for the project should normally be registered under Staff costs and not under subcontracting.

The total amount devoted to subcontracting may not exceed **30% of the total cost** of the project.

For translations, only expenditure directly related to translations from and into the official languages of the countries formally participating in the Socrates programme will be accepted, unless explicit prior authorisation is granted by the Commission. Translation costs may not be higher than the market prices in the country where the translation is done.

2.4 Other costs

Other costs, not covered by those indicated above, may be allowed, provided they are:

- necessary for the performance of the project
- reasonable in amount
- fully documented and clearly itemised in the application
- not indicated under another category or item of expenditure.

Specific items of expenditure eligible under this heading include:

- bank charges relating to the opening or maintaining of an account established especially for the project, as well as bank transfer and exchange costs relating to receipts and payments for eligible expenditure under the project. However, charges relating to establishing or maintaining lines of credit, overdraft or guarantee facilities are not eligible. Guarantee facilities are eligible only if required by the Commission;
- the hiring of conference halls or training premises, provided that it is strictly necessary for achieving the objectives of the project;
- costs incurred in producing, translating and publishing documents, when those activities are performed by one of the member organisations of the partnership;
- communication costs (e.g. connection to the Internet) in duly justified cases for projects where activities require very intensive use of communications.

3. General costs

General costs are all administrative costs directly related to project management:

- communication costs (postage, fax, telephone, mailing, etc.)
- infrastructure costs (rent, electricity, etc.) of the premises where the project is being carried out, in proportion to the use of these premises by the project
- office supplies
- photocopies

The costs involved in reproducing documents and publishing are included under the budget item "Subcontracting costs" or "Other costs", as the case may be. The item "General costs" may not cover staff costs or any other costs already declared for another item.

General administrative costs must be calculated on the basis of an estimate of the actual costs borne by the beneficiary (all the member organisations of the partnership) for the activities concerned. General costs may not exceed a maximum of **7% of the total cost** of the project.

APPENDIX A
STAFF CATEGORIES

According to the International Standard Classification of Occupations
(ISCO-88 (COM))

STAFF CATEGORY 1

- 100 Legislators, senior officials and managers**
- 110 Legislators and senior officials**
- 111 Legislators and senior government officials
- 114 Senior officials of special-interest organisations
- 120 Corporate managers**
- 121 Directors and chief executives
- 122 Production and operation managers
- 123 Other specialist managers
- 130 Managers of small enterprises**
- 131 Managers of small enterprises

STAFF CATEGORY 2

- 200 Professionals**
- 210 Physical, mathematical and engineering science professionals**
- 211 Physicists, chemists and related professionals
- 212 Mathematicians, statisticians and related professionals
- 213 Computing professionals
- 214 Architects, engineers and related professionals
- 220 Life science and health professionals**
- 221 Life science professionals
- 222 Health professionals (except nursing)
- 223 Nursing and midwifery professionals
- 230 Teaching professionals**
- 231 College, university and higher education teaching professionals
- 232 Secondary education teaching professionals
- 233 Primary and pre-primary education teaching professionals
- 234 Special education teaching professionals
- 235 Other teaching professionals
- 240 Other professionals**
- 241 Business professionals
- 242 Legal professionals
- 243 Archivists, librarians and related information professionals
- 244 Social science and related professionals
- 245 Writers and creative or performing artists
- 246 Religious professionals
- 247 Public service administrative professionals

STAFF CATEGORY 3

- 300 Technicians and associate professionals**
- 310 Physical and engineering science associate professionals**
- 311 Physical and engineering science technicians
- 312 Computer associate professionals
- 313 Optical and electronic equipment operators
- 314 Ship and aircraft controllers and technicians
- 315 Safety and quality inspectors
- 320 Life science and health associate professionals**
- 321 Life science technicians and related associate professionals
- 322 Health associate professionals (except nursing)
- 323 Nursing and midwifery associate professionals

- 330 Teaching associate professionals**
- 331 Primary education teaching associate professionals
- 332 Pre-primary education teaching associate professionals
- 333 Special education teaching associate professionals
- 334 Other teaching associate professionals
- 340 Other associate professionals**
- 341 Finance and sales associate professionals
- 342 Business services agents and trade brokers
- 343 Administrative associate professionals
- 344 Customs, tax and related government associate professionals
- 345 Police inspectors and detectives
- 346 Social work associate professionals
- 347 Artistic, entertainment and sports associate professionals

STAFF CATEGORY 4

- 400 Clerks**
- 410 Office clerks**
- 411 Secretaries and keyboard-operating clerks
- 412 Numerical clerks
- 413 Material-recording and transport clerks
- 414 Library, mail and related clerks
- 419 Other office clerks
- 420 Customer services clerks**
- 421 Cashiers, tellers and related clerks
- 422 Client information clerks

Annex 4 : Legal Entity Forms

The Legal Entity Forms are available on the Europa Server at the following address: http://europa.eu.int/comm/budget/execution/legal_entities_fr.htm. There are two different forms provided for organisations, one for private organisations and one for public organisations. Please complete the appropriate Legal Entity form for the applying organisation **and attach the requested documents**.